

Purpose of this Workbook

This Workbook accompanies the **Multi-Sector Guide to Pandemic Economic Resilience**. The Guide is built on the understanding that communities and regions need to respond to the disaster at hand but also have the resources, tools, and other capabilities to build and sustain disaster resilience practices to thrive and grow.

The Guide is interactive, and encourages engagement with several different levels of government, agencies, organizations, and communities. Because of this, it is formatted in a series of worksheets that individuals can work through to prepare, respond, and adapt to a pandemic.

How to Use this Workbook

To edit this document:

* Download a copy and save it on your computer or on your network.
* Fill out the worksheets directly in the document, adding space and making modifications as best work for you.
* Continue to review and update your responses as conditions change. What makes sense at one point in the pandemic may no longer be appropriate later on.

[**Assess & Strategize**](#_Assess_and_Strategize)

[**Communicate Effectively**](#_Communicate_Effectively)

[**Collaborate Across Sectors**](#_Collaborate_Across_Sectors)

[**Adapt & Maintain Operations**](#_Adapt_Maintain_Your)

[**Reflect & Prepare**](#_Reflect_and_Prepare)

**Contents**

[Assess and Strategize 1](#_Toc130969407)

[Worksheet 1: Identify Your Response Team 1](#_Toc130969408)

[Worksheet 2: Clarify Your Fundamental Purpose and Role 2](#_Toc130969409)

[Worksheet 3: Identify Regulators and Points of Influence 4](#_Toc130969410)

[Worksheet 4: Map Your Relationship with Other Organizations 6](#_Toc130969411)

[Worksheet 5: Assess the External Environment 8](#_Toc130969412)

[Worksheet 6: Evaluate Organizational Assets and Risks 10](#_Toc130969413)

[Worksheet 7: Segment Your Business Community 13](#_Toc130969414)

[Worksheet 8: Determine Your Priorities 15](#_Toc130969415)

[Communicate Effectively 17](#_Toc130969416)

[Worksheet 9: Assess Your Communication Assets and Needs 17](#_Toc130969417)

[Worksheet 10: Develop a Communications Plan 20](#_Toc130969418)

[Collaborate Across Sectors 21](#_Toc130969419)

[Worksheet 11: Find Shared Priorities 21](#_Toc130969420)

[Worksheet 12: Collaborate on Policies 22](#_Toc130969421)

[Adapt Maintain Your Operations 24](#_Toc130969422)

[Worksheet 13: Consider Your Workforce 24](#_Toc130969423)

[Worksheet 14: Evaluate Opportunities for Remote Work 26](#_Toc130969424)

[Worksheet 15: Analyze Your Supply Chain 27](#_Toc130969425)

[Worksheet 16: Identify Opportunities for Adaptation 30](#_Toc130969426)

[Worksheet 17: Evaluate Disease Management Measures 31](#_Toc130969427)

[Reflect and Prepare 34](#_Toc130969428)

[Worksheet 18: Plan to Modify and Deactivate Your Response 34](#_Toc130969429)

[Worksheet 19: Reflect on Your Experience 35](#_Toc130969430)

[Worksheet 20: Develop an Improvement Plan 37](#_Toc130969431)

#

# Assess and Strategize

### Worksheet 1: Identify Your Response Team

|  |  |
| --- | --- |
| *Who is responsible for planning pandemic response?* |  |
| *Who is responsible for economic continuity?* |  |
| *Who has final authorization over financial decisions?* |  |
| *Who has final authorization over personnel decisions?* |  |
| *Who has final authorization over operational decisions?* |  |
| *Is there an oversight board? If so, what are their decision-making powers?* |  |
| *How can each of these actors stay engaged in the pandemic response and recovery planning process?* |  |
| *Date last updated:* | *
 |

### Worksheet 2: Clarify Your Fundamental Purpose and Role

It is important that you begin by grounding yourself in your **fundamental purpose** as an organization and mapping your relationship to others. Worksheet 2 contains questions and a cluster mapping exercise to support this.

***Your Fundamental Purpose or Mission***

*What is your mission or fundamental purpose as an organization?*

*What are your top priorities as an organization to support this mission?*

*What metrics do you use to track your organization’s progress on those priorities?*

***Your Relationship with Others***

*Who do you serve?*

*What customers, industries, businesses, or organizations depend on your products or services?*

*Who are your peer organizations and/or competitors?*

*What inputs do you depend on to do your work? This includes supplies, information, workers, and other factors.*

*What supporting entities enable your organization to continue operating by providing infrastructure, consulting services, permitting, oversight, or other functions?*

*What government agencies regulate your operations?*

*This may include multiple agencies at different levels of government and is additionally complex for organizations with regional operations. See* [*Worksheet 3: Identify Regulatory Bodies*](#_Worksheet_3:_Identify) *for a step-by-step overview of how to identify those agencies.*

*Whose behavior does your organization influence, regulate, or guide? This includes employees and customers.*

###

### Worksheet 3: Identify Regulators and Points of Influence

**Worksheet 3** helps you identify which agencies and levels of government have:

* **Direct** regulatory influence on your organization.
* **Indirect** regulatory influence on your organization by affecting your workforce or other inputs your operations rely on, including nonprofits and businesses in your community.

With this assessment complete, you can:

* Provide input on policies and regulations relevant to your industry by communicating with regulators directly, or through intermediaries (like a business association) that represent your sector.
* Share this information with others, including businesses and business associations in your cluster, and encourage their input in the regulatory process.
* Collaborate with the public sector to establish policies and safe work plans

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Level of Government** | **Agency** | **Role** | **Direct or Indirect Influence** | **Points of Contact** (or Points of Influence through an intermediary) |
| **Federal** |  |  |  |  |
| **State** |  |  |  |  |
| **County** |  |  |  |  |
| **City** |  |  |  |  |

### Worksheet 4: Map Your Relationship with Other Organizations

Your organization relies on a complex network of relationships and interdependencies between interconnected organizations, suppliers, institutions, and agencies to maintain daily operations. A cluster is a “geographic concentration of interconnected companies and institutions in a particular field.” Cluster mapping can help you visualize these interconnected relationships among businesses and other organizations.

You can use the cluster mapping exercise for your own organization. If you are a public sector or nonprofit organization that supports others, you can also map the clusters you serve or your community’s whole economy.

* Who are the primary producers of goods and services in the cluster? Place organization names in cell B2 (at the intersection of Column B and Row 2).
	+ Which government agencies regulate these producers? List them in cell B1.
	+ Which entities support\* these producers? List them in cell B3.
* Who are the customers or end users of the goods and services produced by the organizations listed in cell B2? List them in cell C2.
	+ Which government agencies regulate these customers or end users? List them in cell C1.
	+ Which entities support\* these customers or end users? List them in cell C3.
* What inputs are needed by the producers in cell B2? List them in cell A2.
	+ Which government agencies regulate these suppliers? List them in cell A1.
	+ Which entities support\* these suppliers? List them in cell A3.

\* When thinking of Supporters, consider government agencies, nonprofits, business or industry groups and organizations; educational institutions; providers of physical or electronic infrastructure; transportation providers; or others who enable the activities of the producers of goods and services. Examples include permitting agencies, legal advisors, marketing firms, technology support firms, etc.

Carry the results of this mapping exercise, particularly identified interdependencies, into the next steps of **assessing the external environment** and **evaluating assets and risks**.

\* When thinking of supporters, consider government agencies, nonprofits, business or industry groups and organizations; educational institutions; providers of physical or electronic infrastructure; transportation providers; or others who enable the activities of the producers of goods and services. Examples include permitting agencies, legal advisors, marketing firms, and technology support firms.

Cluster that is mapped:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Column A: Inputs** | **Column B: Goods and Services**  | **Column C: Customers or End Users** |
| **Row 1: Regulators** |  |  |  |
| **Row 2: Primary Producers of Goods and Services** |  |  |  |
| **Row 3: Supporters\***  |  |  |  |

### Worksheet 5: Assess the External Environment

Emergencies, and pandemics in particular, are dynamic events with changing circumstances and an understanding of the disease that is evolving as we learn more. It is important to maintain a current understanding of what is known about the disease and who is affected as you assess risk and vulnerability for yourself and key stakeholders.

Answer the questions below. Continue to come back to these questions over the course of the pandemic, updating your answers as necessary.

**Last Updated:**

***What is known about the disease?***

*Where are we in the Arc of the Pandemic?*

*How well understood is the disease?*

*What is known about how the disease is spread?*

*What actions are understood to reduce spread of the disease?*

***Who is getting sick?***

*Who is most vulnerable to getting sick from? Vulnerability may be the result of preexisting conditions that may be exacerbated by the pandemic.*

*What populations are most at risk of significant impact from the disease?*

*How severe is the sickness among different population groups?*

*How is your community affected relative to others?*

***What disease management measures are in place to try to reduce spread of the disease?***

*Are current interventions relatively broad, or relatively narrow and focused?*

*How do current disease management measures impact person-to-person interaction?*

*How do current disease management measures impact business activity, including manufacturing, office-based business, retail, and restaurants?*

*What activities or cultural practices are limited by current regulations, policies, and guidelines to prevent disease?*

*How do those limitations impact different population groups?*

*What social practices are present in your community related to disease management measures?*

###

### Worksheet 6: Evaluate Organizational Assets and Risks

The work you’ve done thus far can help identify risks to your organization. Consider the following as you answer the questions in **Worksheet 6**:

* [**Worksheet 4: Map Your Relationship with Other Organizations**](#_1hmsyys) and your relationship to others.
* What’s known about the disease and the population level risks identified in [**Worksheet 5: Assess the External Environment**](#_1v1yuxt).

Public sector entities and business associations can use these questions and the cluster mapping exercise from [**Worksheet 4: Map Your Relationship with Other Organizations**](#_1hmsyys) to identify the risks faced by the businesses and nonprofits they serve, as well as their own organization’s risks.

1. ***Assets***
2. ***Community Assets***

*Who are your strongest supporters within your local or regional community?*

*How can you maintain that support within your community?*

*What is the value of maintaining this community support to your organization?*

1. ***Business Operations Assets***

*What operational assets can you rely on? Consider your people and relationships, brand, competitive advantages, and physical infrastructure or equipment.*

*What is your organization doing now that could support ongoing pandemic response efforts?*

*What can you modify within your operations to strengthen an existing advantage?*

*What are ways you could change your current operations to fill a stated need in pandemic response efforts?*

*How much (approximately) would this cost?*

***Summary of Assets***

*What are the top five most existing assets for your organization?*

*What strategies will help maintain and grow these assets as you respond to the pandemic?*

1. ***Risks***
2. ***Information Risks***

*What information gaps are likely to persist or increase, making it difficult to make informed decisions?*

1. ***Regulatory Risks***

*Given what is known about the pandemic, how might regulations change to further impact your business?*

*How will your customers be impacted?*

*How will your ability to interact with your customers be impacted?*

*How many of your employees may be impacted because they are vulnerable?*

*How might your employees' families be impacted by the disease?*

*How will this change the risk tolerance of your employees?*

*What industries, businesses, or organizations do you depend on in your normal operations?*

*How do you anticipate them being impacted by the pandemic?*

1. ***Summary of Risks***

*What are the five most pressing risks facing your organization?*

*What strategies may help address these risks?*

### Worksheet 7: Segment Your Business Community

It is important that public sector agencies appreciate differences among members of your business community and tailor communications, direct support, and engagement accordingly.

* Not all businesses can be reached the same way.
* Businesses may experience the pandemic in vastly different ways depending on how the disease affects their customer base, workforce, and partners.
* Depending on their size and relationship to others, different businesses will have different impacts on the local or regional economy and offer different opportunities to contribute to the broader pandemic response.

Use Worksheet 7 to help identify different segments within your business community. Solicit input from local economic development and business agencies or organizations. Use [**Worksheet 4**](#_Worksheet_4:_Create) to develop cluster maps of key industry sectors as another way to identify the interdependencies among the different aspects of your economy.

*What industries or businesses are most important to:*

* *Your community’s employment base?*
* *Tax collections and sustainability of important public sector services?*
* *Other businesses and service providers in your community?*

*Which businesses are vulnerable, and would most benefit from outreach and resources?*

*This assessment should consider:*

* *Which businesses will experience the largest impact to daily operations because of pandemic prevention measures?*
* *Which businesses or sectors (if any) have had operations shut down due to pandemic prevention measures?*
* *How will the pandemic impact a business or sector’s customer base, workforce, or operations?*
* *Which businesses are primarily owned and/or operated by, or serve members of, historically marginalized communities?*

*What resources, if any, does your agency have to support members of these communities?*

*What are some of the supportive resources available through federal, state, or local providers?*

*How accessible are these resources to business owners? Accessibility includes availability of resources in multiple languages, English language proficiency required to understand how to access these resources, the ability to complete applications, and the level of financial or other documentation required to access these resources.*

*What can your agency do to supplement these resources?*

*Which businesses could be good partners in cross-sector collaborations?*

*Which businesses and sectors have a large number of employees or important assets that can* *be leveraged in the broader response?*

*Which businesses can serve as role models for other businesses, serving as examples for others to follow?*

###

|  |  |
| --- | --- |
| Worksheet 8: Determine Your Priorities | *Shape  Description automatically generated with low confidence* |

This worksheet serves to help you determine your pandemic focus and priorities by building on the work you’ve completed to date. This is an essential step that will provide important guidance for your ongoing efforts.

What are the top five strategic priorities for your organization as you respond to the emergency? You will revisit these priorities as the pandemic progresses and conditions change. While they may stem from point-in-time challenges and opportunities, they should always be aligned with the fundamental purpose of your organization identified in [**Worksheet 2**](#_Worksheet_2:_Clarify).

Your priorities may be determined by:

* Concerns based on identified population, organization, or economic risks.
	+ Opportunities to best achieve your mission or organizational purpose. These opportunities may be market- or customer-driven as you adapt and meet emergent needs, based on where you can most add value given gaps in services provided by others, or related to your specialized knowledge or relationships.

**Top 5 Priorities for Our Organization**

1.
2.
3.
4.

|  |  |
| --- | --- |
| Court with solid fill Cheers with solid fill | **Non-profit and Public Sectors: Consider Equity and Priority Service Populations** |

|  |
| --- |
| Consider the deployment of other resources, including federal, state, and regional efforts. Where are there gaps, particularly for vulnerable populations or businesses that you might be able to serve?  |
| How can you most effectively target limited resources to make the greatest positive impact? |
| Based on your answers to these questions, which populations or business types will you prioritize in your pandemic response? These are your **priority populations**. | Users with solid fill |

Consult legal advisors to ensure that this prioritization of scarce resources is defensible and non-discriminatory. Communicate your priorities to your policy makers, your workforce, your partners, and other stakeholders.

Carry this focus forward as you consider how to communicate, provide direct assistance, and take other actions.

# Communicate Effectively

### Worksheet 9: Assess Your Communication Assets and Needs

This worksheet will guide you in identifying your communications assets and needs. You will build upon this scan as you develop your Communications Plan.

**Communication Assets**

*What information do you rely upon to perform your function effectively?*

*Where do you obtain that information?*

*How might that information gathering be impacted by the pandemic?*

*How does information flow through your community?*

*How does information flow through your organization?*

*How do you communicate to individuals in different parts of your organization?*

*How has that changed during the pandemic?*

*Who relies on communications from you, considering both internal and external audiences?*

* *Internal audiences may include Board of Directors and employees.*
* *External audiences may include customers, regulators, suppliers, business associations, and other intermediaries.*

*Which business or industry associations represents your interests?*

*What information do they share? What information would you like them to share, potentially including market data, resources, and best practices?*

*What interests would you like them to represent on your behalf?*

*What are your existing means for communicating to internal and external audiences?*

**Communication Needs**

*What kinds of information would be helpful to your organization to know as you begin making decisions?*

*Can this information be known? If so, what organizations are most likely to have that information available?*

*Which groups in your service community or target audience may not be receiving your communications?*

*Do you have any contacts within those communities (or with organizations that represent them) that you could reach out to directly?*

*What are other ways you could reach people to provide relevant information?*

*How can you make your communications accessible to all audiences, including those who rely on interpretation, translation, or the use of adaptive technologies such as screen readers?*

*How can you reduce translation timelines and other barriers to immediate access to information and services?*

*Where do you need to enhance your access to interpreters and translators?*

### Worksheet 10: Develop a Communications Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Icon  Description automatically generated | Shape, icon  Description automatically generated | Text, icon  Description automatically generated | Diagram  Description automatically generated with low confidence | Icon  Description automatically generated |
| **Identify your audiences**: customers, clients, Board of Directors, staff, etc. List one audience per row. | **Determine the primary and secondary objectives**: inform, assure, solicit input, etc. | **Determine the delivery method**: email, social media post, status report, presentation, meeting, press release, etc. Anticipate the need for interpretation and translation. | **Determine frequency**: daily, weekly, monthly, quarterly, etc. | **Determine the right messenger**: CEO/ president/director, Board, emergency manager, health official, etc. |
|  |  |  |  |  |
|  |  |  |  |  |

# Collaborate Across Sectors

### Worksheet 11: Find Shared Priorities

|  |  |  |
| --- | --- | --- |
|

|  |  |
| --- | --- |
| List the Strategic Priorities that you identified in [**Worksheet 8: Determine your Priorities**](#_Worksheet_8:_Determine_1). Use your insights into the other sectors to hypothesize what is most important to them. | Circle with left arrow with solid fill |

*Public Sector Strategic Priorities* 1.
2.
3.
4.
5.

*Private Sector Strategic Priorities*1.
2.
3.
4.
5.

*Shared Strategic Priorities*1.
2.
3.
 |

*Continue to the discussion questions and* ***Worksheet 12*** *on the next page.*

### Worksheet 12: Collaborate on Policies

Identify opportunities for ensuring safe work conditions, using Worksheet 12 as a guide.

*What are the fundamental goals of existing policies?*

*How do existing policies align with what is currently known about prevention of this disease?*

*Would significant changes to these policies disrupt economic and social activities? If so, how?*

*Are there cases where rigid enforcement of existing policies may be counter to consideration of multiple dimensions of public health? If so, what does that look like?*

*How do business operations need to change to continue working safely?*

*What changes are allowable under existing laws and regulations?*

*For changes not currently allowed, do these qualify as reasonable, allowable accommodations or will additional action need to be taken to enable safe working conditions?*

*What resources are needed to make the changes?*

*Can businesses afford to make these changes?*

*What support may be available from the public sector to accelerate the changes?*

*What legislative changes might be needed to allow safe working conditions during the disease outbreak in question?*

*What legislative committees have rulemaking power over the industry?*

*Once an agreement has been reached on one or two (or more) changes, what next steps need to be taken to continue working safely?*

# Adapt Maintain Your Operations

Part of managing disruptions during a pandemic is maintaining your workforce, including [providing support for employees](#_36ei31r). Use **Worksheet 13** to begin to understand your workforce and what changes may need to be made as the emergency develops.

### Worksheet 13: Consider Your Workforce

**Understanding your Workforce**

*What are the demographics of your industry or organization’s workforce?*

*On average, how vulnerable is your workforce to the disease outbreak in question?*

*If the average worker is not vulnerable to the disease outbreak, how might the disease impact their families and/or communities who may be vulnerable?*

**Internal Policy Analysis**

*What is the organization’s paid sick leave policy?*

*Does the organization have a plan to implement disease management measures for sick employees?*

*Does the organization have the ability and capacity to track infection rates and infection transmission from employee to employee (known as contact tracing)? How might contact tracing be received by the workforce?*

**Communicating**

*How does the organization communicate with employees?*

*How can you ensure employee buy-in for the disease management measures you enact?*

**Staff Planning**

*Which staff perform mission critical functions?*

*Are there other staff members trained to perform these functions if the lead is out sick?*

*If not, how can the organization train additional employees on the functions in question?*

*How might the organization’s daily functions and activities change if staff is reduced due to illness, position vacancies, etc.?*

**Protecting your Workforce**

*What types of Personal Protective Equipment (PPE) will your organization need to operate safely and within appropriate regulations?*

*Where can you source that PPE?*

*Are there public sector programs that can help you pay for PPE?*

**Supporting your Workforce**

*What are the physical and mental health needs of your employees? What stresses are they subject to and how can you support them?*

*What are the needs of your employees’ families? Consider factors such as childcare, food security, and housing stability.*

### Worksheet 14: Evaluate Opportunities for Remote Work

Use **Worksheet 14** to determine what remote work could look like at your company or organization.

*What positions or tasks could be performed remotely?*

*What should the parameters be for remote work?*

*What are the standards you should set for video and audio participation in calls or meetings?*

*What are the expectations for evening or weekend responsiveness?*

*Can employer-owned equipment be brought home (computers, monitors, chairs, etc.)?*

*Should employees be allowed to work from out-of-area locations?*

### Worksheet 15: Analyze Your Supply Chain

**Initial discussion questions to begin analyzing your supply chain:**

*What are the physical inputs my organization uses in daily operations?*

*Where do those inputs come from? Does that place have a disease outbreak and/or measures* *in place that may prevent my inputs from getting to you?*

*What alternative inputs are available?*

*How do they compare in price, quality, quantity, etc.?*

See the specific questions for the private and public/nonprofit sectors on the following pages.

|  |  |
| --- | --- |
| **Private Sector** | Briefcase with solid fill |

**Identify**

*Who is responsible for overseeing local and regional supply chain issues in our organization?*

*Which of our critical suppliers may be impacted by disease management measures?*

**Coordinate**

*How can our organization work with suppliers to ensure they understand our on-site disease management measures and can follow those appropriately?*

**Adapt**

*How can we find alternate suppliers for our critical inputs? If those do not exist, how might we* *work with the public and non-profit sectors to help ensure we continue receiving inputs?*

**Monitor**

*Who is responsible for long-term monitoring of supply-chain issues?*

|  |  |  |
| --- | --- | --- |
| **Public and Nonprofit Sectors** | Court with solid fill Cheers with solid fill  |  |

**Identify**

*What activities occur in our region that connect to broader supply chains? How are these* *activities impacted by disease mitigation measures?*

*How can we best communicate with stakeholders about the impacts of potential or planned disruptions?*

**Coordinate**

*How can we coordinate with suppliers and supporting businesses to help them prepare for slowdowns or delays?*

**Adapt**

*How could we help the private sector businesses in our region connect and identify if other local organizations could fill supply-chain induced gaps?*

**Monitor**

*How can we promote regional production of critical inputs to create a supply chain more resilient to disruptions?*

### Worksheet 16: Identify Opportunities for Adaptation

Successful businesses adapt constantly to changing market conditions. Regulations and consumer behavior may shift multiple times over the course of a pandemic as uncertainty gives way to greater knowledge and vaccines, seasons, variants, and the simple passage of time affect what consumers are comfortable doing. Use this worksheet to identify potential challenges and opportunities for your business or organization.

*What are your traditional customers experiencing? How could you best meet their changing needs?*

*What activities do current regulatory conditions and disease management measures allow? What opportunities does the pandemic create?*

*How can you leverage your assets, expertise, and customer relationships for opportunities created by the pandemic?*

*How can you repurpose day-to-day operations to respond to pandemic needs?*

*What technologies could reduce person-to-person contact to make customer operations safer?*

*What functions can be done remotely and how do you protect workers that have to work in-person? →* [*Adopt remote work models where appropriate.*](#_Worksheet_14:_Evaluate)

*What is your plan for employee absenteeism? →* [*Support workers and address potential labor shortages.*](#_Worksheet_13:_Consider)

*What kind of assistance do you need to continue operating?*

*How might you collaborate with other sectors to get what you need or to provide a resource to others?*

### Worksheet 17: Evaluate Disease Management Measures

The public, private, and non-profit sectors can all contribute to preventing the spread of infectious disease and breaking the Chain of Infection, as explored in [Public Health Basics](#_Public_Health_Basics). However, efforts to prevent the spread of infectious disease may impact an organization’s daily operations, and have real social, economic, and hard costs associated with them.

This worksheet presents a model for evaluating potential infection reduction interventions in terms of:

* their ability to prevent infections, both as directed and as implemented;
* their social impacts, as directed and as implemented;
* their economic impact, as directed and as implemented; and
* their direct costs, as directed and as implemented.

The direct cost category refers to the costs incurred by public and private sector actors to implement the interventions. Wage, job, and price impacts are included under the economic impact category.

Knowing where you are in the [Arc of a Pandemic](#_The_Arc_of) is also important, as the interventions available and the effectiveness of infection reduction strategies will generally improve as more is understood about the disease in question. Given that pandemics and how disease management measures are received change over time, you should repeat this through the different pandemic phases as more information is available.

**Assignment of “high,” “medium,” and “low” costs for each potential is subjective** and best determined in comparison to other interventions.

The Guide contains an example of this worksheet filled out from the hypothetical perspective of an owner of an office-based business such as a professional services firm relatively late in the pandemic when much is known about how the disease is spread.

This template can be used in [Worksheet 20: Develop an Improvement Plan](#_Worksheet_20:_Develop) to assess potential interventions for future pandemics.

| **Interventions** | **Disease Management**  | **Social Impact** | **Economic Impact** | **Direct Costs** |
| --- | --- | --- | --- | --- |
| **As directed**  | **As implemented** | **As directed**  | **As implemented** | **As directed**  | **As implemented** | **As directed**  | **As implemented** |
| **Reservoir** | **Interventions that reduce contact between people and where the pathogen lives (the reservoir)**  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Portals of Exit** | **Interventions that prevent pathogens from leaving their hosts (via portal of exit)** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Mode of Transmission** | **Interventions that reduce the likelihood that an infected person has contact with others** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Portal of Entry** | **Interventions that prevent pathogens from entering a susceptible host (via portal of entry)****Interventions that reduce the likelihood of transmission during contact between an infected person and others** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
| **Susceptible Host** | **Interventions that reduce the likelihood a person will be infected with a pathogen** |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |

# Reflect and Prepare

### Worksheet 18: Plan to Modify and Deactivate Your Response

As conditions change over the course of the pandemic, revisit the questions you asked yourself earlier as you [assessed the external environment](#_Worksheet_5:_Assess) in Worksheet 5. Consider when you may safely deactivate your response.

*What metrics are being used to measure when disease management measures implemented by your organization can be relaxed?*

*What is your plan for scaling down disease management measures?*

*What pandemic adaptations will you retain because of health and safety benefits, efficiency improvements, or customer service enhancements?*

*How might the disease management measures be re-engaged if there is a new outbreak or variant of concern?*

*What are the signs or metrics you will track to identify when these events occur?*

*Does it make sense to return to a pre-pandemic or pre-outbreak workplace scenario? If not, how can your organization codify changes made during the pandemic? If yes, see the next module for suggestions on how to reflect on your experience and leverage lessons learned as you prepare for future emergencies.*

*When was your communications plan last updated? Refer to your* [*Communications Plan*](#_Worksheet_10:_Develop) *as you communicate with staff, customers, and other stakeholders.*

### Worksheet 19: Reflect on Your Experience

As your organization deactivates its pandemic response, it is critically important that you reflect and learn from your experience with the aim of identifying and celebrating what went well in addition to determining where there are lessons learned and room for improvement. **Worksheet 17** can be used to guide your organization’s internal reflections.

**Preparedness**

*In what ways were you (as an organization) prepared for the pandemic?*

*In what ways were you not prepared?*

**Response**

*What were the one or two most significant challenges you experienced during the COVID-19 response?*

*What necessary resources did you have challenges accessing during the response?*

*What new patterns and processes in your work emerged during the response? Did you establish any noteworthy ways of working differently with your partners?*

*What are successes and lessons learned for each of the following?*

* *Focusing on your mission while adapting to emergent strategic priorities.*
* *Adapting your service delivery for the benefit of prioritized populations.*
* *Communicating with key internal and external audiences.*
* *Adapting to the changing business climate and needs of your customers.*
* *Adapting to the needs of your workforce?*

**Overall Learnings**

*What are you most proud of in your organization’s response?*

*What would you do differently in a future pandemic response?*

*What are the one or two most important actions your organization can take now to be prepared for a future pandemic response?*

### Worksheet 20: Develop an Improvement Plan

This worksheet contains a structure for an Improvement Plan which can be used to manage your organization’s efforts to prepare for future pandemics.

**Guidance:**

* Identify major areas for improvement and list one or more corrective action for each area.
* Identify no more than one Lead for each area.
* Resource needs may include staff time, equipment, or other factors, as well as financial resources.

| **Topic or Area for Improvement** | **Corrective Action/s** | **Roles**  | **Resource Needs** (if any) | **Target Completion Date** |
| --- | --- | --- | --- | --- |
|  |  | Lead: Support/s:  |  |  |
|  |  | Lead: Support/s:  |  |  |
|  |  | Lead: Support/s:  |  |  |
|  |  | Lead: Support/s:  |  |  |