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Emergency Plans

- April 2020, we issued memos regarding the continuity of Services in response to a threat environment
 - SBOA Memo – Continuity of Essential Operations
 - SBOA Memo – Coronavirus Items to Consider
- How do we move forward???



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Continuity of Essential Operations

- Order of Succession
- Delegation of Authority
- Access to bank accounts
- Compile procedures and necessary information
- Information Technology – local system, Case management, election
- Prioritize duties and deadlines



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Proactive, not Reactive

- Look Back
 - What have we learned
 - Correct any issues
- Take Stock
 - What worked and what didn't
 - What changes do we need to make
- Plan for future
 - Review and revise plans
 - Prioritize plan



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Look Back

- What worked and what didn't?
- What could have worked better?
 - Designated successor
 - Remote Access
 - Appointment only
 - Staggered work force
 - Remote work



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Take Stock

- Where are you now?
 - Is everything caught up?
 - Have you reviewed the work from the past year?
- What do you have and what do you still need?
 - Shields and PPE
 - Equipment and technology
- What procedures and policies need to be reviewed and updates?
 - Order of Succession
 - Internal controls



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Review

- If you haven't already done so, review the work from last year.
- Financial records are up to date
- Review IT or Banking Access given to designated individuals
- Any work that was done under procedures established to address the pandemic needs to be reviewed for completeness and accuracy
 - Work done remotely
 - Staggered work force with less oversight
 - Work that was catch up when office had been closed



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Plans for Moving Forward

- What still needs to be done – set your plan to address those needs
- Set a priority of those needs
- Determine a cost/budget
- Set a time-line for the plan

- Update your Emergency plan – keep it current and relevant



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PUTTING IT ALL TOGETHER

Unique to your office, your resources and your staff. We will assist you in brainstorming.



QUESTIONS

