As the state, localities and health officials begin to set parameters around reopening businesses, bringing credit union employees back on-site successfully will not be as simple as flipping a switch. Every credit union is unique, some have workers who may be able to continue working remotely, while others have operations to restart or brick and-mortar locations to bring back to life. However, each credit union faces the same concerns: where to begin, how to keep employees protected, when to communicate, and determining what is the best way to drive the credit union forward.

Credit unions can start by asking: What do I need to do to be ready to bring employees back to the workplace?

Credit unions can utilize this checklist to make sure they address the key areas to focus on for reopening the workplace.

Leading & Communicating Change

☐ Is the credit union leadership team prepared and trained to lead and address concerns as they arise?
☐ Can we re-purpose our COVID-19 pandemic management team to become our transition and return-to-work team? Is that group ready to continuously monitor workplace impact?
☐ Are we building a plan to implement and communicate a Workplace and Safety, Health, and Sanitation Plan?
☐ Do we have the information necessary to facilitate swift, data-driven decision-making?
☐ Have we developed a communications and engagement plan that addresses employees returning to the office and workers who are remaining remote?
☐ Do we have a plan for training on new processes, policies and operational procedures during the transition and beyond?
☐ How will we define and measure a successful transition?
Managing Health & Safety

☐ Have we planned sanitization protocols that are more stringent than regular cleaning?

☐ Do we have guidelines for physical distancing and personal protective equipment (PPE) use?
  o If mandatory, do we have a plan on obtaining PPE for employees?
  o How will we handle discussions with any employees who request to not wear PPE?

☐ Have we, or can we, secure safety equipment for use by employees?

☐ Have we identified tiers of necessity—who really needs to be in the office and when?
  o Can we determine if remote work is feasible for certain or all roles?
  o Can we consider staggered shifts or phasing-in the return of employees?

☐ Do we have a plan for monitoring and minimizing the use of common areas?

☐ What verification methods will we use to ensure the health of our employees, keeping privacy and credit union policy in mind?

☐ How will we outline and communicate member and visitor protocols?

☐ Do we have a policy on immunity or disease testing?

☐ Do we have a contingency plan in place should there be a spike in COVID-19 cases during the return transition period?

☐ Do we have a realistic plan to adapt our office or other workspaces to limit close contact between employees, including conference rooms and meeting spaces?

Compliance & Workplace Policies

☐ Have we reviewed CDC, federal, state, and local guidelines and recommendations for returning to the credit union? What is the frequency of monitoring for changes in regulations?

☐ Should we update our internal policies (e.g., rehire, travel, remote work, video conferencing standards, attendance, paid time off, rehire, health and safety) for this transition and beyond?

☐ Are we in compliance with the regulatory response that developed as a result of the pandemic?
  o Have we posted mandatory Families First Coronavirus Response Act (FFCRA) posters in the workplace and sent to those working remotely?

☐ Do our employees know how to access FFCRA request forms?

☐ Have we obtained documentation to obtain tax credits under FFCRA, if applicable?
RETURNING TO THE WORKPLACE CHECKLIST

Staff Re-Engagement

☐ What is our plan to regularly communicate COVID-response and re-opening plans to all employees?

☐ Have we confirmed and communicated any benefits, 401k, and paid time off service requirements to workers?

☐ For workers who experienced a change in employment status such as lay-off or furlough, have we issued re-hire or welcome back letters?

☐ How will we manage employees’ individual limitations and comfort levels, including underlying health issues, childcare, etc.?

☐ Have we produced a policy for employees who do not feel comfortable returning to the physical workplace?

☐ Have we established policies to adapt to new conditions, as well as new benefits around health and wellbeing?