

Create Business Continuity Plan

WELL Health-Safety Rating™
Q4 2022 addenda

HOW TO USE THIS DOCUMENT:

This document is intended to serve as a guide on how to create a project **policy/operations schedule to prepare organizations to operate, to the extent possible, under disruptive circumstances.**

This document is meant to demonstrate an acceptable degree of detail for a documentation submission. The Feature cannot be demonstrated solely through a confirmation that the requirements have been or will be implemented. The level of detail is up to the discretion of the project team, but the documents must include specific details demonstrating that the actual policies/protocols have been enacted in the project boundary.

This document and similar tools are intended to assist projects in their pursuit of the WELL Health-Safety Rating but use of this document and/or similar tools are in no way a guarantee of achievement of any rating, certification or other designation, and no representation or warranty is made regarding the likelihood of achieving any rating or designation, and IWBI shall have no liability resulting from the use or content of this document or similar tools or resources or from any action taken or inaction occurring in reliance on this document or similar tools or resources.

Note: The below document is based on the Q4 2022 addenda of the WELL Health-Safety Rating™. Project teams are required to implement the feature requirements from the addenda version assigned to their project or any more recent addenda version.



The below sample documentation is intended to provide guidance in creating an effective Business Continuity Plan. It is not a template. You may note included components that are not required to demonstrate compliance with this Feature.

EXAMPLE DOCUMENT

Example for Section a

Critical business functions are those processes and activities that *[Company]* must maintain when there has been a disruption to normal operations, to sustain the mission of the organization, comply with legal requirements and support life-safety. They are the backbone of the organization and must be continued for *[Company]* to maintain operations.

[This table should be customized and completed to include all critical business functions.]

| <i>[Company]</i> Critical Business Functions | | | | |
|---|-----------------------|-------------------------------|--|--|
| Critical Business Function 1: | | | | |
| Business Process(es) <i>[Insert a high-level description of the processes and/or systems tied to this business function.]</i> | | | | |
| Supporting Elements | | | | |
| Supporting Activities | Lead Point of Contact | Vendors and External Contacts | Vital Records | Max Allowed Down Time |
| | Alternate | | | Criticality |
| <i>[Tasks performed to achieve the critical function]</i> | | | <i>[List of vital records and their location(s) (e.g., contracts, memorandums, access codes, keys, passwords)]</i> | <i>[(e.g., 24 hours, 1 day, etc.)]</i> |
| | | | | <i>[(e.g., High/Medium/Low)]</i> |
| | | | | |
| | | | | |
| | | | | |
| Implications if not Conducted: | | | | |
| Financial: | | | | |
| Operational: <i>[(e.g., Interruption or loss of (X) function would interrupt (X) and result in delay of the capability to (X).]</i> | | | | |
| Staff Implications: | | | | |
| Dependencies: | | | | |
| <i>[Those that are dependent on this function and therefore impacted if it stops]</i> | | | | |
| Function Frequency: | | | | |
| <i>[(e.g., this function is always occurring, this function only occurs in summer months, etc.)]</i> | | | | |
| Required Resources: | | | | |
| <i>[Describe staff, equipment, supplies, etc.]</i> | | | | |
| Facilities: | | | | |
| <i>[In order to execute this function, insert the minimum facilities that are required (e.g., meeting space for XX people, warehouse spaces for XX supplies, office space for XX people)]</i> | | | | |
| Supporting Departments: | | | | |
| <i>[(e.g., finance, HR, IT, etc.)]</i> | | | | |

EXAMPLE DOCUMENT

Example for Section b

BUSINESS CONTINUITY AND RECOVERY PLANNING TEAM

The following people are responsible for business continuity and recovery planning:

| NAME | POSITION | RESPONSIBILITIES | CELL PHONE | EMAIL |
|------|----------|------------------|------------|-------|
| | | REDACTED | | |
| | | | | |

REVIEW SCHEDULE

The emergency planning team will meet at a minimum twice annually to review, test, and update the plan, as needed. The date and location of these meetings will be updated in the table below and meeting minutes will be appended.

| MEETING DATE | LOCATION | ATTENDEES |
|--------------|----------|-----------|
| | | |
| | | |
| | | |

EXAMPLE DOCUMENT

Example for Section c

[Company] has defined what constitutes the severity of impact level for each category based on the type of disaster or disruption. Individual departments will identify activities conducted in each category and identify its level of impact.

In the event the disaster occurs, the priority is to restore all critical activities within [X hours], all major activities within [X days], and all moderate activities within [X weeks]. Minor activities will be restored after the disaster has subsided.

| BUSINESS IMPACT ANALYSIS | | | | | |
|--------------------------|------------------|--------------|-----------------|--------------|-----------------|
| Disaster A: | | | | | |
| Department: | No Impact | Minor | Moderate | Major | Critical |
| Staff | Definition | Definition | Definition | Definition | Definition |
| [Activity A] | | | | | |
| [Activity B] | | | | | |
| Finance | Definition | Definition | Definition | Definition | Definition |
| [Activity A] | | | | | |
| [Activity B] | | | | | |
| Legal | Definition | Definition | Definition | Definition | Definition |
| [Activity A] | | | | | |
| [Activity B] | | | | | |
| Customer Service | Definition | Definition | Definition | Definition | Definition |
| [Activity A] | | | | | |
| [Activity B] | | | | | |

EXAMPLE DOCUMENT

Example for Feature Part d

REMOTE WORK READINESS ASSESSMENT

To assess [Company's] remote work readiness if an emergency, disaster, or other unforeseen event requires the primary work location to close, the following assessment has been conducted for each department to develop strategies for supporting remote work.

| DEPARTMENT: | | | |
|--|-----|----|----------------------------|
| ORGANIZATIONAL PREPAREDNESS | | | |
| | YES | NO | IF NO, IDENTIFY NEEDS HERE |
| Does the Company have remote desktop, VPN, and/or cloud service licenses? | | | |
| Do employees have the ability to dial out through the company phone system remotely? | | | |
| Does the team have access to virtual collaboration tools? | | | |
| Can the team access large files and not oversaturate the business internet connection? | | | |
| Has the department drafted a remote work policy? | | | |
| Are alternate remote work locations required? | | | |
| What percentage of employees are allowed or able to work remotely given the nature of their role/contract? | | | |
| EMPLOYEE PREPAREDNESS | | | |
| | YES | NO | IF NO, IDENTIFY NEEDS HERE |
| Are employees able to remote access the office network from home? | | | |
| Do employees have the necessary tools for remote work (e.g., laptop, monitors, webcam, headset, internet, etc.)? | | | |
| Can employees access e-mails remotely from home? | | | |
| Are employees able to make and receive business phone calls? | | | |
| Do employees have access to high speed internet? | | | |
| Describe any aspects of an employee's job that cannot be performed remotely. | | | |

Based on the remote work readiness assessment conducted the following measures have been implemented to ensure remote work capability for all employees to the extent possible.

[Insert examples of the measure implemented to support remote work here: (e.g., A VOIP phone has been supplied to all remote work eligible employees, a team's collaboration tool license has been purchased to support internal and external communications, a co-working reimbursement may be supplied if needed, etc.)]

EXAMPLE DOCUMENT

Example for Section e

| | Short-term strategies to maintain business continuity | Long-term strategies to maintain business continuity | Steps to Restore and Maintain Operations after the event | Steps to Re-Mobilize if the event reoccurs |
|------------|---|--|--|---|
| Disaster A | | | | |
| Disaster B | | | | |
| Disaster C | | | | |
| Disaster D | | | | |
| Disaster E | | | | |
| Disaster F | | | | |

TIPS FOR MULTIPLE LOCATIONS

- For organizations participating in WELL at scale, this Policy and/or Operations Schedule is categorized as Shareable. It may be shared across multiple projects, as long as they all meet the strategies that are outlined in the document.
 - If you have projects pursuing the rating together that have different business continuity practices, distinct documentation should be developed for each. Identify each of the specific projects by name (must match project names in WELL Online).