

Getting America Back to Work

A LANDSCAPE ANALYSIS



EXECUTIVE SUMMARY

Introduction

The COVID-19 pandemic has wrought a global disruption across all aspects of our society. As several cities in the U.S. begin to approach their projected apex and the economic toll mounts, leaders across the public and private sectors are taking a hard look at the core question, “when and how can we safely and sustainably resume our normal lives?”

Efforts to address this question are complicated, cross-functional and require both global and local considerations, especially for large private sector organizations, that are facing uncertain terrain about how to proceed:

- **There are currently no established best practices around resumption of workplace activities for non-essential businesses.** Even for essential business still operating, recommendations vary by state, industry and organization, and many companies are simply following what their peers are doing.
- **Medical consensus is still evolving daily.** Information on virus transmission, lifespan on surfaces, incubation period, infectiousness after symptoms abate and the ability to be a carrier once recovered is still in the hypothetical stage. These variables will materially impact the ability to safely re-open workplaces without triggering a second wave of infections.
- **Even early success stories abroad have been unable to fully contain the threat.** Public health authorities have their eyes on South Korea, Germany, Iceland, and Taiwan, each of which [flattened their curves early](#) and may see a return to relative normalcy ahead of most other countries hit hard by the pandemic. That said, despite the success of early containment efforts, a resurgence of cases resulting from international travel have led to several countries in Asia to [reimplement more stringent response measures](#).
- **When the government and private sector are ready to resume normal operations, their constituents and workforces might not be.** According to an [April 2020 Gallup panel](#), only 20 percent of Americans would be ready to immediately resume normal, public activities if the government were to lift restrictions on social contact. Of the remaining part of the population, 71 percent would prefer to wait and see and 10 percent would indefinitely continue to limit contact.

Objectives

We examined the current coverage of and materials from publicly available response strategies and proposed operational safeguards from three core stakeholder groups, all of whom will be instrumental in driving these efforts:

1. Federal Government
2. State Governments
3. The Public Health Community
4. The Private Sector.

We also looked for examples of answers to the following common questions:

- What policies and operational changes are being considered to make work environments safe for employees to return?
- Is there a particular order / priority to which sectors resume first?
- Are there any pressure tests to make sure the return is sustainable and safe?
- What plans or infrastructure should be included to help cushion against a possible second wave?

What Success Could Look Like

There is a growing consensus in what measures are necessary to facilitate a successful and safe return to operations:

- Public health experts are aligned on the fact that, while the U.S. is far from ready to lift existing restrictions, the reopening of society will happen gradually, and social-distancing rules will be eased on a rolling basis.
- In the absence of a vaccine, the only way to know where and when to lift measures will be through widespread testing, isolation of individuals infected with the disease, and contact tracing.
- Organizations need to ensure they are able to maintain social distancing among their workforces and between customer-facing employees and customers – through reorganization of current operational models, implementation of new PPE and procedures and flexibility in phasing the returns gradually / allowing some segment of their population to work remotely.

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While there are commonalities among the high level strategic needs outlined in each of the proposed plans to date, there are notable challenges when you look at the finer points in each:

- While serology testing has been widely cited, especially among business audiences, as a key potential tool in getting back to work, the practical landscape is more complex, as researchers still don't have a complete picture on how [immunity from COVID works](#) and the tests on the market are [not consistently reliable](#). As such, it is still too early to use it as a primary method for determining infection or immunity to the disease.
- The length of time that stay-at-home orders will be necessary is still in question – and complicated by the fact that each state has issued these orders at different moments in time, and also differ in their guidance surrounding which essential businesses will remain open, the use of masks in public, and travel within and between states.
- The transition of parents from remote working will be contingent on available childcare, a variable that is beyond the control of most employers. In the U.S., many educational facilities have already [cancelled](#) classes for the remainder of the school year; however, a recent [analysis by Morgan Stanley](#) argued that schools should be re-opened in September.
- South Korea and Singapore, two nations that were quickly able to suppress spread of the virus, relied heavily on technology-enabled surveillance and contact tracing. Most public health authorities urge the development of some system of mass surveillance to enable the safe return to work, but it remains to be seen what type of system would be palatable to more individualistic Americans, who will be sensitive to questions surrounding their civil liberties.

Emerging Key Themes for Private Sector Actors

- **Managing stakeholder expectations of the new normal is a top priority:** Regardless of the pace of the post-COVID transition, the world is not going to revert to pre-pandemic operations overnight, especially without a vaccine. In addition, companies should be prepared to revert back to remote operations until there is a vaccine, as governments may need to quickly reimplement distancing measures in case of a second wave.
- **The recovery is not a global monolith, and the path is not linear:** Different regions, populations and industries may have different needs and timelines in the post-COVID recovery. It is important for organizations to be nimble and responsive to what their teams and communities are experiencing on-the-ground, rather than implementing blanket, one-size-fits all policies.
- **Anticipate graduated response:** Different industry sectors will hold different risk profiles and will be able to consider the costs of mitigating these risks accordingly as the health care response moves through distinct phases. Until there is a wide-spread vaccine different industries will need to consider their ability to manage these risks.
- **Look to the state governments:** As during a natural disaster, much of the ballast for responding to an emergency lies within U.S. state governments. Clear signs on when and how to reopen business will be given through Executive Orders and guidance issued from U.S. state governors and governments, as evidenced by the widespread lockdown of the country that began in March. The federal government will issue guidance and the plan released on 16 April endorses the approach of a state led reopening, including through regional blocs.
- **Read the experts:** The White House Coronavirus Taskforce, the Centers for Disease Control and Prevention and the National Institute of Allergy and Infectious Diseases are led by seasoned professionals providing critical national public health advice. While these agencies will not issue overt 'green lights' to restart American life, the data they release, the messages they send, and the guidance they issue will be closely monitored by state governments in making local determinations on when and how to resume parts of the economy.

FULL CONSTITUENCY FINDINGS

FEDERAL GOVERNMENT

Key Players

- **The White House Coronavirus Task Force:** The White House has established a taskforce chaired by Vice President Mike Pence and supported by Response Coordinator Dr. Deborah Brix, a leading global immunologist. Dr. Anthony Fauci, head of the National Institute of Allergy and Infectious Diseases, also sits on this task force and has emerged as the federal government's most trusted voice on the. Both Brix and Fauci have served Administrations of both political parties and are respected experts in their respective fields. The Taskforce, along with the Centers for Disease Control and Prevention (CDC) and the Federal Emergency Management Agency (FEMA), issue federal government policy and guidelines.
- **Congressional advisers:** The White House has assembled several groupings of advisers to assist on reopening the economy. This includes a bipartisan group of lawmakers from both the House and the Senate.
- **Other players:** On April 13, [Fox News](#) published a partial list of potential members of a task force formed by President Trump to reopen the economy, including Ivanka Trump, Jared Kushner, Commerce Secretary Wilbur Ross, Agriculture Secretary Sonny Purdue, Transportation Secretary Elaine Chao, and other Cabinet members.

Current plans

On April 16, The White House released its "[Opening Up America Again](#)" guidelines, which provides states with a gradual, three-phase approach to that would ease restrictions based on specific case count and hospital capacity threshold criteria. While the plan offers guidance to state and local officials, it also endorses that governors will be driving the decision-making process in their individual states and in collaboration with other governors in their regions.

In addition, [The Washington Post](#) obtained a copy of a forthcoming public health strategy created by FEMA and the CDC discussing ways to reopen parts of the country. The plan in its current state incorporates three phases:

- A national communications campaign and community readiness assessment that would continue until May 1;
- A ramping up of manufacturing of testing kits and personal protective equipment as well as an increase in emergency funding and;
- the staged reopenings of organizations and business.

The CDC and FEMA see their first priority as reopening schools, day cares and summer camps; which would enable parents to return to work; but notes that a return to shelter-in-place orders may be necessary until vaccines are developed or herd immunity is achieved. Communities that were not hit as hard by the virus are likely to be reopened much sooner than those in former hot spots, the plan notes.

STATE GOVERNMENTS

This crisis has significantly upped the national authority and voice of state leaders. With states under emergency declarations and many legislatures suspended, governors are commanding significant authority and policy direction. For businesses wanting to resume operations they will need to look to their local state government for authorization.

States are gathering into regional clusters to coordinate both their shutdowns and their re-openings. Governors are forming these 're-start' blocs where they fear major adjoining population centers will move cross state lines should any one jurisdiction reopen ahead of another creating new vector sources and transmissions. There are two influential governors emerging as increasingly nationally leader leaders.

Key players

- **Governor Andrew Cuomo:** On the East Coast, Governor Andrew Cuomo of New York has organized his state to join with New Jersey, Connecticut, Pennsylvania, Delaware, Massachusetts and Rhode Island
- **Governor Gavin Newsom:** On the West Coast Governor Gavin Newsom of California is leading his state with Oregon and Washington State.
- **Other players:** On April 16, [seven states in the Midwest](#) – Illinois, Indiana, Kentucky, Michigan, Minnesota, Ohio, and Wisconsin – announced a coalition between their states. We can expect other formalized or loosely arranged regional clusters to continue to emerge where they make geographic sense.

Current plans

Naturally the timing of state by state reopening will differ between the regional blocs. The plans released to date vary on detail and precise timing, but we can see direction trends.

The East Coast bloc has been less prescriptive on their conditions to reopen but have instead outlined the process for doing so. The states of the Northeast corridor have formed an advisory council comprising of a representative health expert, economic expert and Governor's Chief of Staff per state to recommend when and how to reopen sections of that regional grouping. Governor Cuomo has stated a graduated phased reopening will be triaged based on how essential a business is and the risk of their infection rate caused by its reopening.

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[Reuters reports](#) that Cuomo has engaged McKinsey & Company to assist on providing data points for that regional grouping to determine when and how to reopen, including on testing rates and infections. It is reported that Deloitte is also involved in developing the regional reopening plan.

Lead by California, the western bloc of states has outlined six indicators for modifying the stay-at-home order:

- Increased testing, contact tracing and isolating those who are positive or exposed;
- Preventing infection in people who are at risk for more severe COVID-19;
- Increased hospital and health systems capacity to handle surges;
- Development of therapeutics for treating COVID-19;
- Physical distancing for businesses, schools, and childcare facilities to support children of the workforce; and
- Monitoring and knowing when to reinstitute stay-at-home orders if necessary.

In the [joint statement](#) announcing the Midwest partnership, the seven governors enumerated four key metrics that will help them determine the timing of reopening their economies:

- Sustained control of the rate of new infections and hospitalizations;
- Enhanced ability to test and trace;
- Sufficient health care capacity to handle resurgence; and
- Best practices for social distancing in the workplace.

PUBLIC HEALTH COMMUNITY

Key players

Outside of Government, former Food and Drug Administration commissioner Scott Gottlieb is a leading public voice, whose team at the American Enterprise Institute has authored [one of several plans in circulation](#) for the reopening of American society. Meanwhile, a chorus of voices within the public health community – including academic researchers, physicians, and thought leaders – is encouraging a slow, gradual, and phased return to normalcy. These experts include Dr. Eric Topol, Founder and Director of the Scripps Research Translational Institute; Ezekiel Emanuel, an oncologist and former adviser to the Obama administration; Dr. Ashish Jha, director of the Global Health Institute at Harvard University; and researchers at Harvard’s T.H. Chan School of Public Health and the Johns Hopkins Center for Health Security and the Johns Hopkins Bloomberg School of Public Health, among others.

Current plans

The common strand between all plans in development is a recommendation that the easing of social-distancing rules occur on a rolling basis. Key points of the plans in circulation:

- A group of health experts at the [Center for American Progress](#), led by Dr. Emanuel, focus on the prerequisites for reopening society. These include an increase in testing capacity; the development of serological tests that can detect immunity; a ramping up in the production of adequate personal protective equipment; and developing a better system for contact tracing and isolation to prevent the future spread of the disease.
- [Gottlieb’s team](#) at the American Enterprise Institute recommends a four-step approach. In Phase I, efforts would focus on slowing the spread of the disease. Once case counts fall for 14 consecutive days, we would move into Phase II, which recommends a state-by-state reopening as each state develops the capacity to safely diagnose, treat, and isolate individuals with COVID-19. During this phase, even as normal life resumed, some physical distancing measures would remain in place, and be strengthened whenever cases resurge. However, the majority of schools, universities, and businesses would reopen; even as adults over the age of 60 would be encouraged to limit time in the community. In Phase III, which will occur only once safe and effective tools for mitigating the risk of the disease are in place – including therapeutics, broad surveillance, and/or a vaccine – physical distancing restrictions can be fully lifted. Finally, in phase IV, the country would begin efforts to prepare for future pandemics. Key sticking points for moving from Phase I, where we are now, and into Phase II, as laid out in this plan, include a national capacity for testing at least 750,000 people per week, sufficient critical care capacity in hospitals, expanded access to ventilators, an increased supply of personal protective equipment, and the implementation of a comprehensive COVID-19 surveillance system.
- Meanwhile, researchers at The Johns Hopkins Bloomberg School of Public Health have issued several reports to with insights that can help map a path forward, including:
 - Most recently, they released [guidance for governors](#), which builds upon the proposed phased approach outlined in the American Enterprise Institute’s national roadmap and includes a framework for how state-level decisionmakers should consider risk assessments, proposed measures for nonessential businesses, schools, and other large community facilities, and proposed action plans.
 - An earlier report focused primarily on [enabling COVID-19 case finding and contact tracing](#) in the U.S., arguing that relaxing physical distancing measures will require “a national vision and federal guidance” for how state and local health departments can trace, care for, and

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monitor individuals with the disease. This includes a scaling up of the U.S. public health workforce, including a team of contract tracers, and the development of new technological solutions for diagnosis and tracking the disease.

- Finally, as controversy ensues over its handling of the coronavirus epidemic, the [World Health Organization has released its own strategic advice](#) for countries considering relaxing its social distancing measures, which includes six criteria: 1) Transmission is controlled; 2) Health system capacities are established to detect, test, isolate, and treat every case and trace every contact; 3) Outbreak risks are minimized in special settings like health facilities and nursing homes; 4) Preventive measures are in place in workplaces, schools and other places where it's essential for people to go; 5) Importation risks can be managed; and 6) Communities are fully educated, engaged and empowered to adjust to the new normal.

External response

Even as they present plans for the gradual reopening of society, public health experts broadly agree that the U.S. is far from ready to lift existing restrictions. In the absence of a vaccine, the only way to know where and when to lift measures will be through widespread testing, isolation of individuals infected with the disease, and contact tracing. "I'm worried we don't have the systems in place to carefully reopen the economy," Gottlieb [told the Wall Street Journal](#).

Increasing testing capacity is the biggest sticking point. Dr. Ashish Jha, director of the Global Health Institute at Harvard University, says we would need to run [at least a half million tests per day](#) before we can relax social distancing rules – nearly three times the current level of testing. Healthcare systems are doing what they can to ramp up testing but face critical supply shortages. David J. Skorton, president of the Assn. of American Medical Colleges urged the federal government to take a more definitive role in managing testing efforts [in a letter to the White House](#).

Implementing a stronger system of contact tracing will also be essential, says Topol, a cheerleader of the digital health space. “It’s a recipe for failure if there isn’t a way to have people under some type of surveillance to see if the virus is bouncing back,” [he told Bloomberg](#).

Finally, any plan for a return life as we once knew it must be flexible. A study published by researchers at Harvard’s T.H. Chan School of Public Health on Tuesday warns that even as we ease social distancing efforts in some areas, we may need to periodically tighten them again as the virus resurfaces. “Intermittent distancing may be required into 2022 unless critical care capacity is increased substantially or a treatment or vaccine becomes available,” [they wrote](#).

PRIVATE SECTOR

Key players

As the COVID-19 pandemic impacts every business in the private sector on some level, every industry is working through their response strategies on parallel tracks. Notable voices that have been engaging on this issue – whether on a sector, organizational and individual level – and / or serve as representative examples of proposed roadmaps for the next phase include:

- **Essential businesses:** As essential businesses in food services, shipping, public transportation, food supply and production, and other critical industries have had to maintain operations throughout the COVID-19 pandemic, we can look to policies they have put into place and challenges they have faced in protect employees and customers. In addition, given the fluid environment that essential businesses were operating in, they also faced labor challenges that can serve as cautionary examples. Many essential businesses have faced allegations that their protections for essential workers were inadequate, including strikes from [Instacart and Amazon / Whole Foods workforces](#).
- **Businesses abroad that have resumed operations:** While no country has eradicated the COVID threat, many industries and organizations are watching how their peers in regions that were hit earlier in the wave and have implemented containment efforts approach the transition back to work to glean an understanding of how their best practices and procedures can be applied in the U.S.
- **Prominent CEOs and Organizations:** Executives at many companies across sectors have begun to provide public comments on their thoughts on the needs and changes needed for their organizations to navigate this shift.
- **Industry Organizations & Business Associations:** High-level business and executive organizations, such as the U.S. Chamber of Commerce and the [Business Roundtable](#) have also been providing counsel to their membership on how to approach this eventual shift.

Current plans

Much of the top level conversation around returning to work center upon several requisite conditions that will need to be met to make it safe to bring back the workforce, including the development and implementation of health screening methods and testing capabilities; the introduction of new PPE procedures and policies; and reorganization of existing infrastructures to enable onsite distancing measures.

- The U.S. Chamber of Commerce released [initial guidance](#) for its membership on a national back to work plan, which provided an overview of essential services that employers will need to consider in bringing employees back – testing, PPE, childcare – as well as notable medical privacy and liability considerations that may result from new policies related to COVID response.
- A report from [Morgan Stanley](#) suggests three milestones to be required before a region of the country can start to open up while minimizing human and economic casualties:
 - Peak in new cases and deaths. To guard against the risk that a large outbreak could reignite, new cases and deaths should be trending downwards, particularly a sustained reduction in cases for at least 14 days (i.e., one incubation period of the virus) should occur.
 - Fully staffed and equipped hospitals. Hospitals in the region must safely be able to treat all patients requiring hospitalization without resorting to crisis standards of care.
 - Widely available high-capacity testing and surveillance.
- Businesses are also preparing policies and employee communications around how their workforce will be monitored for reinfection or antibodies to prevent a resurgence of the virus. Serology testing has been cited as a potential tool for determining the actual infection rate of COVID-19 in certain populations, potential immunity from the virus, and as a potential route for allowing people to leave lockdown and return to work. Temperature tracking is another metric many organizations are considering. Notable highlights include:
 - The U.S. Equal Employment Opportunity Commission issued [guidance](#) in mid-March, saying it is legal for companies to ask employees if they have symptoms of COVID-19, such as a cough or shortness of breath, and take their temperature.
 - JPMorgan Chase CEO [Jamie Dimon](#) wrote a letter to shareholders that emphasized how testing and the ability determine if people have recovered and are now relatively immune from COVID-19 could accelerate the return to work process. “Initially, we need a buffer period of days or weeks for people to be tested, and then for those who test negative for the virus, we need to discover whether virus antibodies appear through serology testing,” Dimon said.
 - [General Motors Co.](#) is considering a number of testing options for its workforce, with an emphasis on options that deliver quick results. The company is also considering antibody testing.
 - [Amazon](#) anticipates providing diagnostic tests to its entire workforce and is working with pharmaceutical companies to obtain equipment to screen workers at its distribution centers.
 - Walk-through temperature scanners are one option that many companies are considering. [Tyson](#) has introduced temperature scanners at several processing plants to date, and other companies reportedly looking at implementing them include Goldman Sachs and UPS.
- Across a range of settings – offices, manufacturing facilities, and public / consumer facing businesses, like restaurants and entertainment venues, companies are also considering how to reorganize their operations to allow sufficient space to maintain social distance.
 - Businesses have long relied on a five-tier inverted pyramid called the “[hierarchy of controls](#)” to reduce workplace risks to employees. Experts [say](#) this framework will also be the basis for companies’ plans to return to work, which will manifest in a variety of new protocols.

- Occupational Safety and Health Administration recommends that retailers consider installing “sneeze guards,” or walls of plastic or glass, to protect cashiers. It also tells companies to adjust production lines to provide more space between workers.
 - Fiat Chrysler plans to implement additional protocols such as redesigning work stations to maintain proper social distancing when [restarting](#) its U.S. and Canadian plants in early May.
 - In announcing the return of 2,500 workers for Washington state’s largest employer, [Boeing](#) promised to stagger shift start times and implement a policy of one person per row on site shuttles.
 - Chris Reynolds, chief administrator for manufacturing at [Toyota Motor Corp.](#)’s U.S. division discussed how the company was considering restarting American auto assembly lines in *The Wall Street Journal*. Some measures he mentioned included: running the lines will at slower speeds than normal to help maintain social distancing measures in plants and extending protocols implemented in Toyota’s emergency medical-supply production, such as on-site health screenings for workers, to auto production efforts when they restart.
 - Steakhouse chain [Texas Roadhouse Inc.](#) is considering capacity, environmental and customer behavior changes, including operating dining rooms at reduced capacity with staggered seating, potentially installing plexiglass or wood dividers between booths, and maintaining social distancing among waiting customers by require them to stand outside or wait in their cars.
- The broad consensus among private sector opinionmakers is that nonessential workers will return to work in a phased, gradual process:
 - A recent letter issued by The Business Roundtable [proposed](#) that that federal government assign geographic risk levels on a sliding scale in order to guide local officials and employers; the breadth and speed of the lifting of restrictions would track closely with the risk assessment provided by the federal government.
 - Erik Gordon, a professor at the University of Michigan’s Ross School of Business, [advises](#) that any return to work effort will be a gradual process, rather than setting a national “go back to the office” day. Jonathan Segal, an employment attorney at law firm Duane Morris who specializes in human resources and minimizing companies’ legal and business risks, [agrees](#). He explains that a gradual return would help maintain social distancing in early days and give companies time to require employees to complete health assessments or get tested.
 - Morgan Stanley’s report also reflects this stance: “Coming back to work will happen in stages with reduced staffing in the office: We believe the first wave to return will be those who have recovered from the virus (positive serology) and the young/healthy. We see a maximum of 50% of employees being allowed back in the office over the summer months.”

External response

Given the broad consensus around many of the measures, news coverage of these issues have been relatively straightforward to date. That said, more aggressive and unconventional methods, such as [Major League Baseball](#) exploring the idea of staging a season by setting up a biodome in the Phoenix area and sequestering players there, have been met with skepticism.

The larger conversation about workplace safety has also resurfaced larger workplace issues, such as employee benefits, paid leave, and childcare.