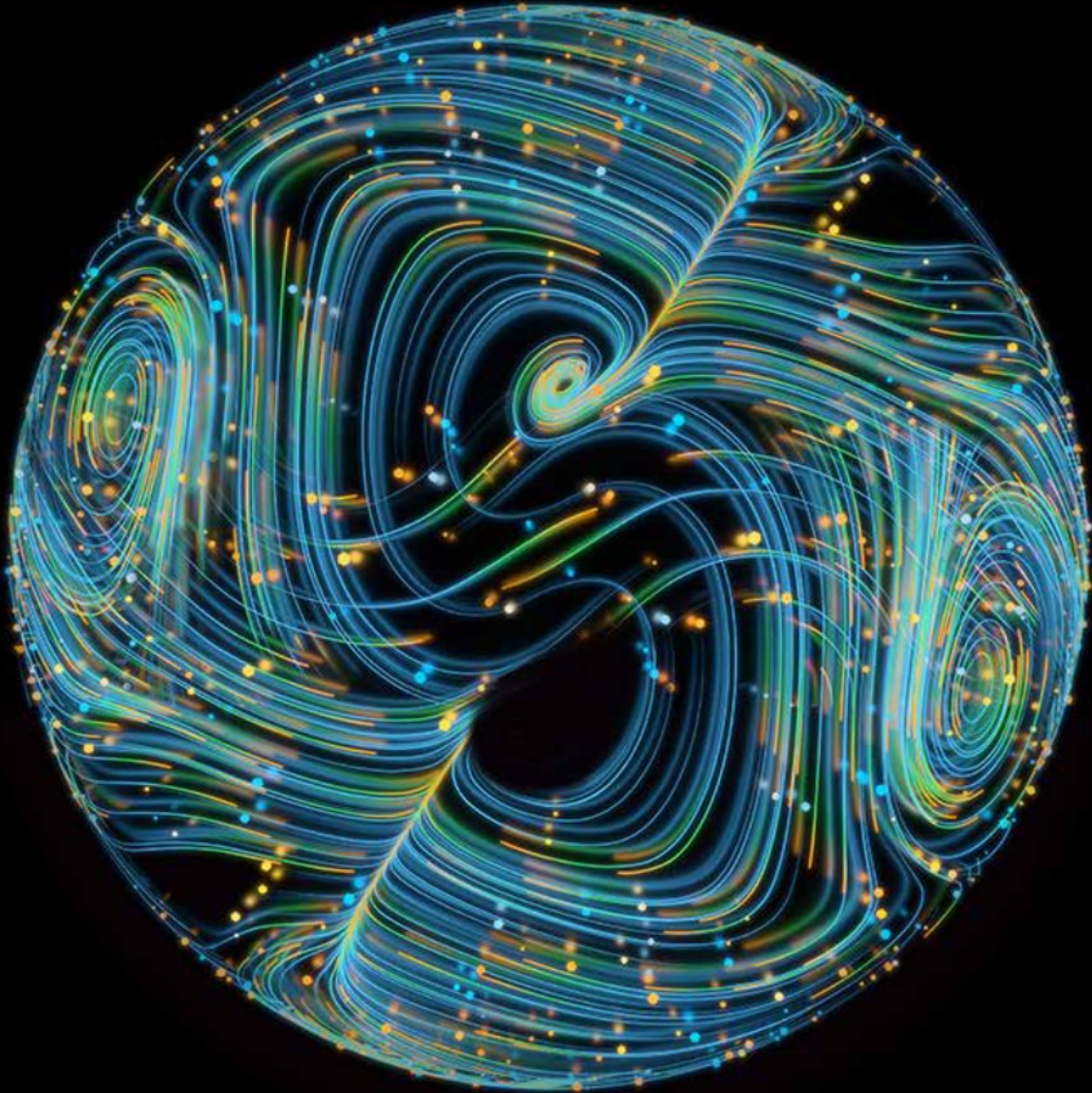


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# COVID-19 Coalition

JULY 2021



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## Purpose

Local coalitions can improve cohesion and enable faster response and recovery from the COVID-19 outbreak. This playbook is meant to support a coalition to quickly mobilize and drive impact in the community. Contents are suggestions and each coalition will likely need to tailor their approach to fit local needs.

# Content

## Document Overview

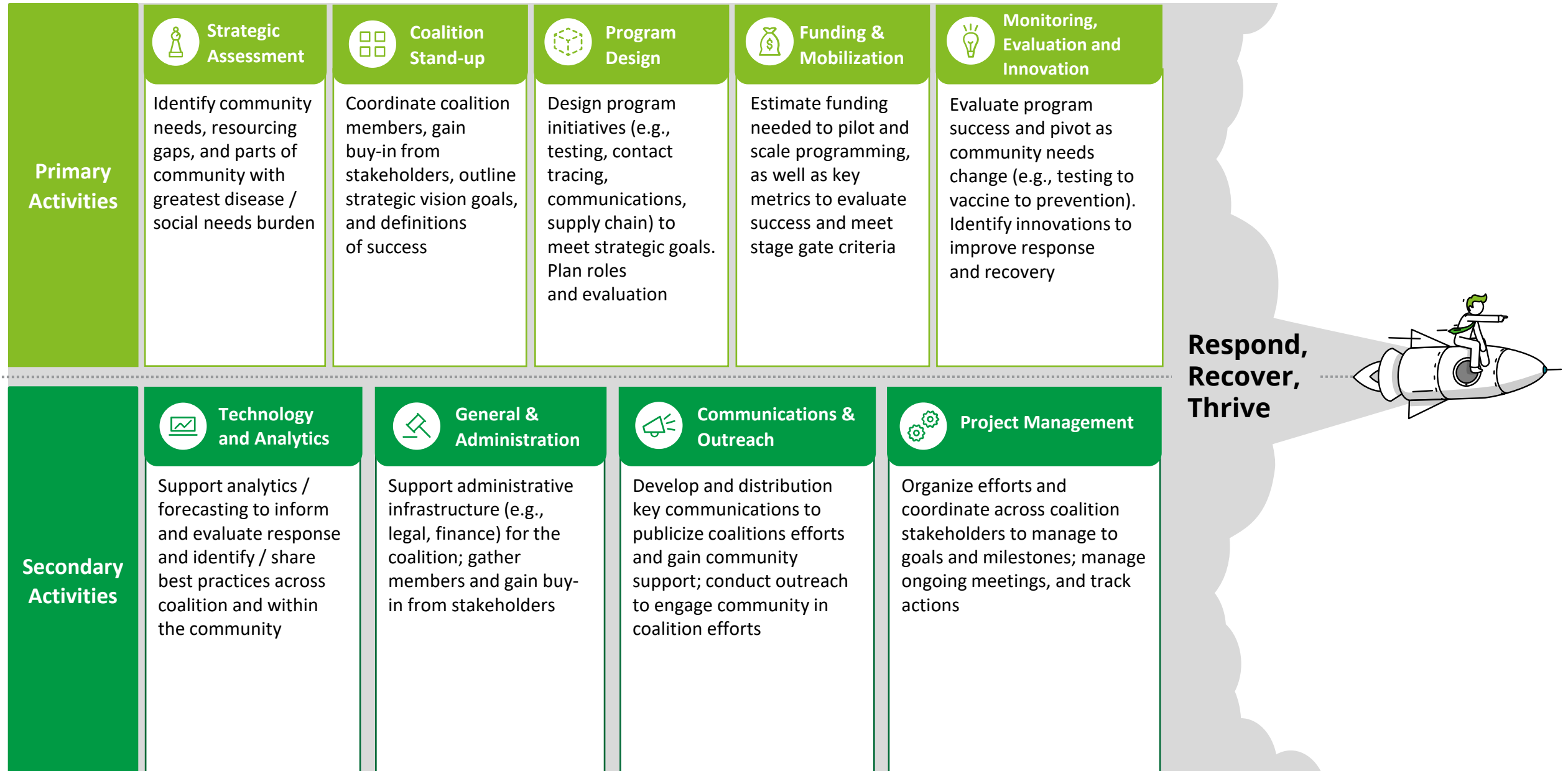
Topic	Description
<b>Primary Activities</b>	
Strategic Assessment	Enables leaders of the initial coalition conveners to gain understanding of challenges facing the local community and prioritize areas of focus for the coalition
Coalition Standup	Provides Founding Members with the activities for selecting additional members to fill key capability gaps
Program Design	Supports dedicated personnel from the coalition in designing highly specific programming to meet goals outlined by Coalition leadership
Funding and Mobilization	Provides a framework for coalition leadership to estimate funding needs to pilot and scale programs, define success criteria, and gain commitments from coalition members
Evaluation and Innovation	Supports dedicated personnel from the coalition in consistently reviewing progress and improving approaches to programming to optimize impact
<b>Supporting Activities</b>	
Technology & Analytics	Provides suggested technology & analytics support needed to enable connectivity across member organizations
General & Administration	Provides suggested administration support needed to enable efficient and effective coalition operations
Communications & Outreach	Provides suggested administration support needed to increase collaboration and potential for impact
Project Management	Provides suggested administration support needed to ensure that coalition efforts remain aligned to plan and that roles & resources are appropriately allocated



# Introduction

# Key Coalition Activities

This playbook is organized into the following activities to enable coalitions of private, public, and nonprofit sector players to facilitate a more cohesive response across the value chain – supporting markets as they respond, recover, and thrive



# Primary Activities

# Strategic Assessment

An assessment of quantitative and qualitative data across five focal areas should be the first step to gauge response and determine where coalitions should supplement public response

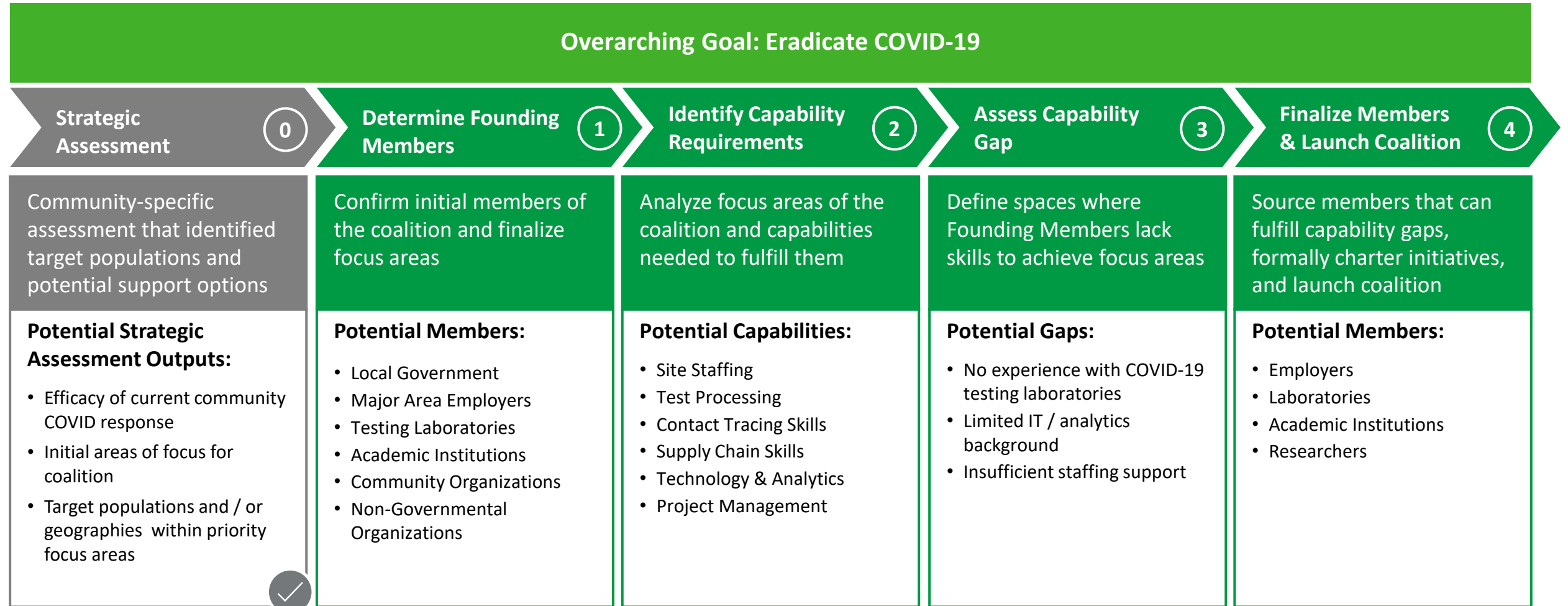
Impact on the Coalition	Effective Response	Example Measurement Opportunities
<b>Testing</b>	Accessible <b>testing</b> with swift results for all community residents	<ul style="list-style-type: none"> <li>• Number of people tested per day, across the community</li> <li>• Rate of positive tests per day, across the community</li> <li>• Time to receive results, across the community</li> </ul>
<b>Contact Tracing</b>	<b>Contact tracing</b> completed within 24 hours for all identified cases	<ul style="list-style-type: none"> <li>• Contact tracing turn around time</li> <li>• Overall transmission rate</li> </ul>
<b>Public Health Messaging</b>	Consistent and localized <b>public health messages</b> distributed through various channels to populations of interest	<ul style="list-style-type: none"> <li>• Mobility of population</li> <li>• Extent to which individuals visit specific businesses or other locations</li> <li>• Qualitative data on mask compliance</li> <li>• Public data on trust in government and public health officials</li> </ul>
<b>Social Needs</b>	Services to meet <b>social needs</b> of residents and enable compliance with public health measures	<ul style="list-style-type: none"> <li>• Number or percentage of households located within food deserts</li> <li>• Average household percentage of the Federal Poverty Level</li> <li>• Household distance from public transit</li> </ul>
<b>Vulnerable Populations</b>	Identification of <b>vulnerable populations</b> for targeted interventions	<ul style="list-style-type: none"> <li>• Average age of population</li> <li>• Risk and / or expected burden of comorbidities</li> <li>• Key demographic factors linked to health and / or social outcomes</li> </ul>

**Findings from the strategic assessment should directly inform coalition goals which guide coalition formation, member selection, and programming**



# Coalition Stand-Up

By reviewing the priorities from the strategic assessment, Founding Members can determine gap areas and the capabilities needed in order to deliver on the coalition focus



 **Previously Completed Step**

# Program Design – Testing

A strong testing program can be designed to contain spread and improve recovery for the entire community

## Coalition Response Components

- **Targeted Community Testing Sites** – determine the areas with highest demonstrated need for testing (e.g., high population of essential workers, marginalized communities) and leverage members to set up community testing sites
- **Employer Testing Sites** – conduct screening of asymptomatic individuals for employers to ensure secure office return and protect essential workers
- **Increased Laboratory Capacity** – Include local laboratories as members to reduce testing turnaround time and allow scaling of testing capacity to meet demand
- **Secured Supply Chain** – Utilize economies of scale to create a secure supply chain with trusted partners to reliably provide supplies at an affordable cost



## Who Needs To Be Tested?

The short answer is **everyone**. To make this question easier to navigate, it is helpful to prioritize and segment the population by broad testing use cases:

- Symptomatic Individuals and Close Contacts
- Vulnerable Populations and Close Contacts (Asymptomatic)
- Employers & Educational Institutions (Asymptomatic)



## Overview Of Testing Modalities



	On-Site Testing	Drive-Through Testing	Point-of-Care Testing	At-Home Testing
Description	A specimen is collected at a testing site. Samples are sent to a lab, where results are processed.	A licensed physician orders a test, and a clinician (e.g., RN, pharmacist) collects sample at a drive-through site; patient stays in their vehicle. Samples are sent to a lab, where results are processed.	Samples are collected and tested at point-of-care (e.g., a nursing home) using portable testing devices. Results are processed at point-of-care	Patient is sent a sample-collection kit. Patient self-collects sample at home and ships it to the lab for results processing.

# Program Design – Testing (Cont.)

A strong testing program can be designed to contain spread and improve recovery for the entire community

	Overview	Approach	Questions to Answer
1 Testing Approach	Identify communities in need of expanded testing and select the appropriate types of testing solutions to meet community needs	<ul style="list-style-type: none"> <li>• <b>Cohort Segmentation:</b> Define population cohorts aligned to reopening phases, as well as the frequency with which they should be tested</li> <li>• <b>Testing Paradigm:</b> Evaluate tradeoffs and needs to identify testing strategy (e.g., diagnostic vs. antibody, workforce vs. symptomatic only)</li> </ul>	<ul style="list-style-type: none"> <li>• Who is in need of testing given their current socioeconomic status or work status (e.g., essential workers)?</li> <li>• Employers - Who should be prioritized for returning to physical locations (i.e., cohorts, roles, functions)?</li> <li>• What type of testing should be used? How frequently should target populations be tested?</li> </ul>
2 Collection Site Design	Select testing site methods and design site locations to safely and effectively target priority populations	<ul style="list-style-type: none"> <li>• <b>Collection Site Selection:</b> Pinpoint the types of collection sites that will efficiently reach the target population cohorts</li> <li>• <b>Collection Site Operations:</b> Design the blueprints and operational plans for the site archetypes that best fit within the network</li> </ul>	<ul style="list-style-type: none"> <li>• Which locations can efficiently reach the most people, and how should each site be laid out?</li> <li>• What policies and protocols need to be communicated to ensure a safe testing experience?</li> </ul>
3 Execution & Monitoring	Procure testing supplies and service providers to stand up test sites	<ul style="list-style-type: none"> <li>• <b>Supply Chain Setup:</b> Source vendors and procure materials and services across the entire testing value chain</li> <li>• <b>Partnership Assembly:</b> Form clinical and/or lab partnerships to begin collecting and testing samples as quickly as possible</li> <li>• <b>Financial Planning:</b> Determine the pricing and working capital necessary to scale the testing program</li> </ul>	<ul style="list-style-type: none"> <li>• What testing supplies are needed? Which vendors offer the supplies?</li> <li>• What service providers offer the capabilities needed to operationalize test sites?</li> </ul>

## Key Considerations

### 1 Wide Testing Spectrum

With 150+ available tests, organizations have many options. However, the type and frequency of testing **vary greatly in robustness and costs.**

### 2 Lab-constrained Environment

Laboratory capacity can be constrained as testing scales. It is critical to ensure lab partners have **sustainable capacity that meet organizational needs.**

### 3 No 'One-stop' Shop

An end-to-end testing and supply chain service is critical to efficient testing. Coalitions should **assemble solutions to enable an in-house testing capability.**

# Program Design – Contact Tracing

Due to the rapid spread nature of COVID-19 and presence of asymptomatic carriers, swift contact tracing at the local level is necessary to curb the transmission of the disease

## Contact Tracing Definition & Challenges

Contact tracing is the process of **identifying individuals** who may have **come in contact with an infectious disease**, collecting additional information from them, and **isolating them from the general population**

### Types of Contact Tracing:

#### Traditional

In-person notification where testing, treatment, isolation, and quarantine is arranged

#### Digital

Digital applications to automate test scheduling and results reporting

### Parties Involved:

- **Index Case** – Determined as the first positive case
- **Direct Contacts** – Comes into close proximity of the index case within the incubation period (~2 weeks)
- **Case Investigator** – Interviews index case, identifies potential direct contacts, and creates communication strategy
- **Contact Tracer** – Notifies direct contacts of potential exposure
- **Contact Tracing Team Leads** – Supervises team of case investigators and contact tracers

### Challenges:

#### Health Metrics

Sufficient levels of testing in population, efficient time-to-test result, and manageable amount of cumulative cases

#### Public Commitment

Ample resources to recruit and train tracers, available support services, and acceptance of quarantine by greater population

## Coalition Response Components

- **Supplement Workforce** – Enhance existing local contact tracing workforce by supplying additional individuals to fill contact tracing roles
- **Develop Workplace Programs** – Create specific contact tracing programs for employers
- **Distribute Messaging** – Align and issue messaging on contact tracing to improve public trust
- **Innovate with Technology** – Create applications and leverage current technology to improve contact tracing methodology
- **Advise on Project Management** – Structure the logistics of local contact tracing programs (training material for tracers, call schedules, follow-up process, etc.)
- **Complement Government Efforts** – Work with local governments currently focused on contact tracing efforts

# Program Design – Contact Tracing (Cont.)

A robust contact tracing program strategy and execution underpins successful coalitions



## Index Case Determination



## Contact Investigation



## Contact Isolation

### Test Local Population

### Isolate Index Case

### Identify Direct Contacts

### Notify Direct Contacts

### Quarantine Direct Contacts

### Follow-Up with Direct Contacts

#### Detailed Process Steps

- |  |   |   |   |  |  |
|--|---|---|---|--|--|
| <ul style="list-style-type: none"> <li>• Conduct COVID-19 testing throughout local population</li> <li>• Document instances of positive cases</li> </ul> | <ul style="list-style-type: none"> <li>• Connect with individuals who have tested positive (deemed as <i>Index Case</i>)</li> <li>• Ensure Index Case is quarantining and has proper recovery information (quarantine duration, expected symptoms, etc.)</li> </ul> | <ul style="list-style-type: none"> <li>• Interview Index Case and determine direct contacts made while infected</li> <li>• Research direct contacts and develop best course of action to deliver informational messaging</li> </ul> | <ul style="list-style-type: none"> <li>• Inform direct contacts of potential exposure</li> <li>• Address questions and determine if contact has experienced symptoms relevant to COVID-19 (if so, repeat <i>Identify Direct Contacts</i> step)</li> </ul> | <ul style="list-style-type: none"> <li>• Provide instructions to quarantine</li> <li>• Indicate local support service options that are available for those that are self-isolating (access to food and prescriptions, financial assistance to cover lost wages, etc.)</li> </ul> | <ul style="list-style-type: none"> <li>• Circle back with direct contacts to monitor symptoms (if showing symptoms, repeat <i>Identify Direct Contacts</i> step)</li> <li>• Continue to provide support service options</li> </ul> |
|--|---|---|---|--|--|

#### Key Parties Involved

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| <ul style="list-style-type: none"> <li>• Index Case</li> </ul> | <ul style="list-style-type: none"> <li>• Index Case</li> <li>• Case Investigator</li> <li>• Contact Tracing Team Leads</li> </ul> | <ul style="list-style-type: none"> <li>• Index Case</li> <li>• Case Investigator</li> <li>• Contact Tracing Team Leads</li> </ul> | <ul style="list-style-type: none"> <li>• Direct Contacts</li> <li>• Contact Tracer</li> <li>• Contact Tracing Team Leads</li> </ul> | <ul style="list-style-type: none"> <li>• Direct Contacts</li> <li>• Contact Tracer</li> <li>• Contact Tracing Team Leads</li> </ul> | <ul style="list-style-type: none"> <li>• Direct Contacts</li> <li>• Contact Tracer</li> <li>• Contact Tracing Team Leads</li> </ul> |
|--|---|---|---|---|---|

# Program Design - Public Health Messaging

Given the mixed-messaging and changes to social norms required to mitigate the virus, coalitions can reduce confusion and increase compliance with localized public health messages

## Coalition Response Components

- **Communication Assessment** – Examine current messaging campaigns and create plan to address gaps in communication types used / demographics addressed
- **Community Messaging** – Align public health messages between various communities
- **Message Localization** – Localize essential public health messaging
- **Communications Expansion** – Utilize existing coalition communication channels to increase potential reach
- **Demographic Targeting** – Engage various demographics and locations with targeted campaigns
- **Metric Tracking** – Use analytic capabilities to track key public outreach metrics and refine strategy
- **Additional Health Messaging** – Create content on broader health spectrum (e.g., reminders to see primary care providers, reminders to exercise)



## Levels Of Involvement

After **analyzing local public health messaging needs** and existing gaps in communication, coalitions can get **involved in two ways**:

- Amplify existing campaigns / messaging
- Create and distribute net new public health messaging content



## Partners



Employers



Local Media



Providers



Academic  
Institutions



Local  
Government



Community  
Organizations

\*Critical partner

# Program Design - Public Health Messaging (Cont.)

A coalition should carefully consider the following list of Public Health Messaging best practices

## Messages – What To Say?

- **Be Consistent:** In a crisis, people actively seek to confirm information from multiple sources. All voices at all levels must deliver the same simple message
- **Promote Simple Actions:** People are discouraged by complexity. They need to see that actions are straightforward
- **Clear Away Obstacles:** Messages should counter resistance to talking to contact tracers such as fear of being forced into self-isolation without essential support services
- **Address Privacy Concerns:** Communications should explain the process in which personal information will be protected
- **Counter Skepticism:** Messengers must consistently remind the public that information and recommendations will continue to change as we learn more about the virus
- **Share Stories of People Taking Action:** Ultimately, this is the most powerful form of motivation. People are much more likely to take actions that we see others taking
- **Saturate with Various Formats:** Messages should be available on a variety of formats to reach various demographics



## Messengers – Who to deliver it?

- **Faith-Based Leaders:** In addition to municipal officials at all levels, community and faith-based leaders should be called upon to deliver important public health messaging
- **Social Influencers:** Social influencers with networks of followers on social media, as well as cultural influencers (actors, athletes, musicians), should deliver messages
- **Survivors:** COVID-19 survivors should be part of a public campaign to encourage certain measures, especially testing and contact tracing
- **Political Leaders:** Political leaders should come together across party lines to demonstrate the non-partisan nature of public health and help depoliticize the conversation around the pandemic

**Note this is an illustrative list and should not be considered exhaustive of all potential messengers**



# Program Design - Support Services

Meeting ongoing needs of the community, particularly in vulnerable populations, to help ensure that all community members have the resources they need to comply with public health mandates

## Coalition Response Levels

Coalitions can respond to increased need for support services with varying levels of involvement, depending on the current community response to needs identified in the strategic assessment

**Help identify needs and connect community members to existing services**

If there is already sufficient response to identified need(s), coalitions can **act as a convener to collate resources** and ensure members are consistently identifying those in need and connecting them with the appropriate services

**Supplement / enhance existing services**

When the ongoing response is insufficient to meet an identified need, if possible, coalitions should look to **partner and expand existing services** rather than start new programming from scratch

**Develop and implement new programs to meet community needs**

In some cases where there is no response to identified needs, coalitions must respond by **designing net new programming to fill gaps**

## Partners



Employers



Providers



Local Government

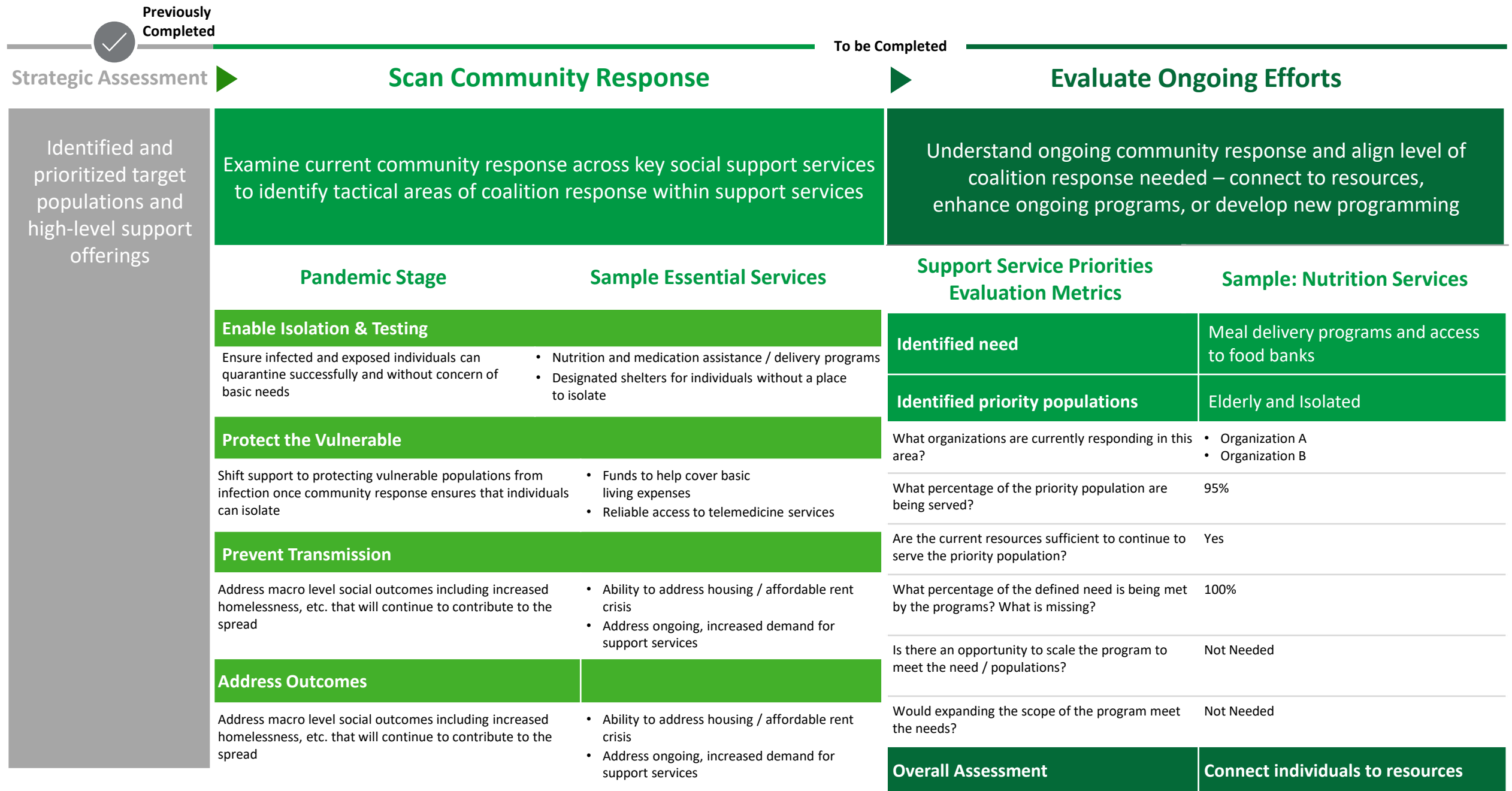


Community Organizations



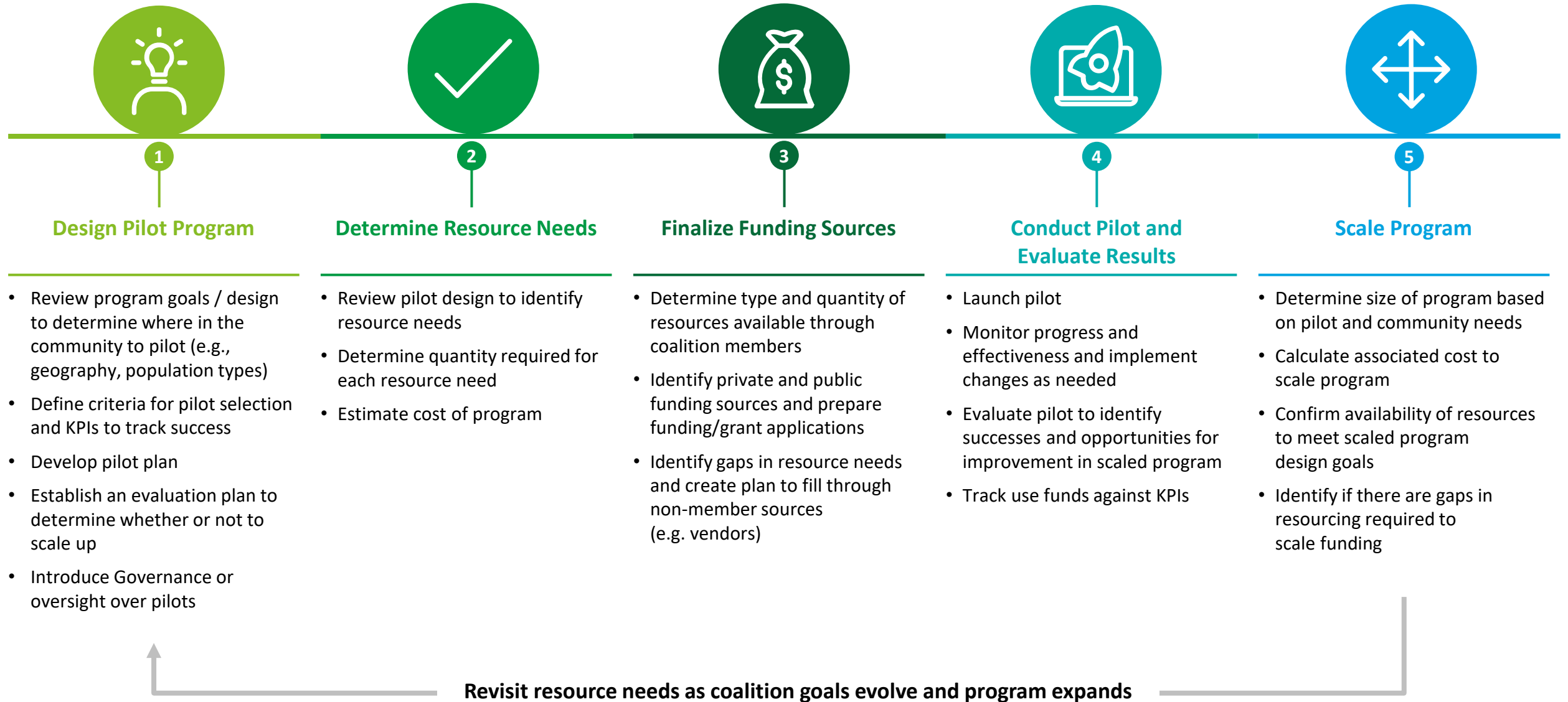
# Program Design - Support Services (Cont.)

Coalitions should use a stepwise approach to prioritize community support needs and determine the appropriate level of coalition response



# Funding and Mobilization

Coalition designed programs should be piloted before scaling – resource needs will be assessed based on program design and will be filled through member or external sources



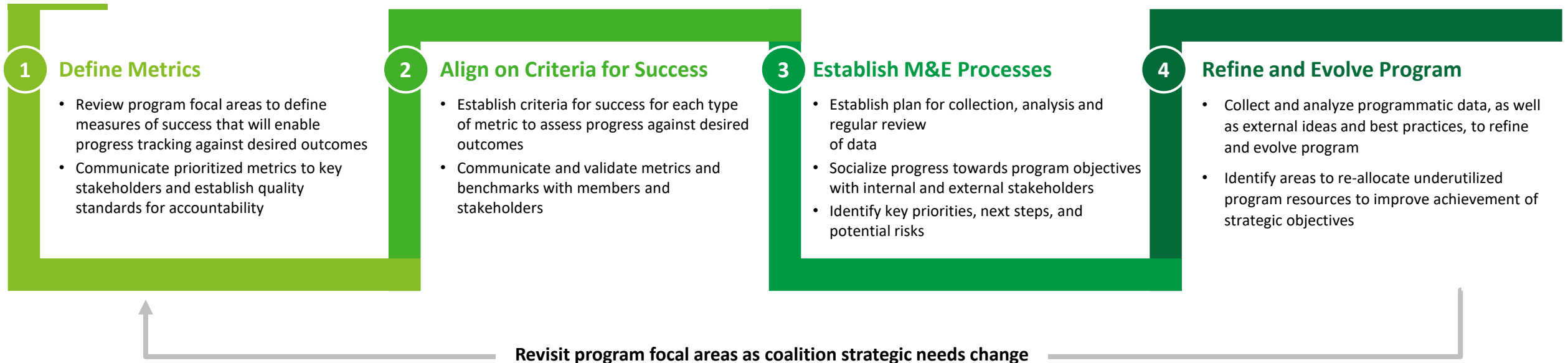
# Monitoring, Evaluation & Innovation

As programs are scaled, M&E enables coalitions to regularly assess whether programs are achieving the desired impact and inform strategic and/or operational changes to program design

## Overview

	Monitoring	Evaluation
<b>Description</b>	Regular collection of information about all project activities to continually assess project progress	Periodic aggregation of data at milestones to inform decision-making and identify any needed changes
<b>Timing</b>	Continuous throughout project	Key project milestones
<b>Scope</b>	Daily project activities	Project deliverables and outcomes
<b>Main Participants</b>	Project staff and members, internal coalition stakeholders	Leaders, donors, external coalition stakeholders

## Process



# Secondary Activities

# Technology & Analytics

Technology and analytics can improve decision-making and enable connectivity across member organizations

	Description	Impact on the Coalition	Leading Practices
<b>Technology</b>	Systems and related processes that enable connectivity across multiple organizations	Enables collaboration and data / information-sharing between different coalition members	<ul style="list-style-type: none"> <li>• Clear strategic vision and stakeholders are aligned to how technology should be harnessed to achieve goals</li> <li>• Coalitions have considered whether to invest in shared infrastructure</li> <li>• Existing manual workflows are automated</li> <li>• Clear implementation timeline</li> <li>• Proposed solutions are scalable and cost-effective</li> <li>• Stakeholders have assessed build vs. buy decisions and have weighed the cost vs. value tradeoff</li> </ul>
<b>Analytics</b>	Data, analysis, and insights generation tools and processes to inform strategic choices and ongoing operations	Enables reporting on public health outcomes and business performance while supporting ongoing evaluation of coalition programs to enable better decision making	<ul style="list-style-type: none"> <li>• Clear strategy for analytics and how it will support decisions</li> <li>• Data sources are accessible and data elements are gathered expediently</li> <li>• Data should be stored in a standard format while protecting patient privacy</li> <li>• Data is aggregated across disparate source systems across the continuum</li> <li>• Hierarchy of accuracy established by which conflicting data can be adjudicated</li> <li>• Near real-time, cross-functional reporting is enabled</li> <li>• Increased focus on predictive analytics to proactively manage risk factors</li> <li>• Reporting speed is balanced with accuracy to manage organizational timelines</li> </ul>

# General & Administrative

These General & Administration components focus on the structure and development of the coalition and teaming across members

	Description	Impact on the Coalition	Leading Practices
<b>Legal</b>	Considerations for the legal structures and support needed to enable the coalition to operate efficiently and meet key requirements.	Supports the coalition in being legally protected as well as internally aligned on key policies and procedures.	<ul style="list-style-type: none"> <li>• Legal agreement between members that clearly defines the distribution of liabilities and assets is established</li> <li>• Resolution mechanisms are built into the legal and teaming agreements</li> <li>• Expectations, timelines, and specifications on delivery requirements from members are in place for all major projects and milestones</li> </ul>
<b>Finance</b>	Building a financial function for the coalition to include financial planning, financial targets, and policies and procedures.	Aligns the coalition members on financial contributions, expectations, and reporting; Facilitates resource allocation to critical operations	<ul style="list-style-type: none"> <li>• Finance planning &amp; analysis team supports strategic plans and program design</li> <li>• Financial information is transparent to members</li> <li>• Documentation exists around how operational plans will drive results</li> <li>• Scenario planning and what-if analysis are conducted regularly</li> <li>• Predictive analytics are leveraged to anticipate key changes</li> <li>• Initiatives are deployed to achieve financial and operational targets while aligning financial incentives to desired outcomes</li> <li>• Dashboarding and KPI tracking enable leaders to conduct variance analysis and build accountability towards goals</li> </ul>
<b>Human Resources</b>	Coalition teams need to be proactive in acquiring necessary tools, building a collaborative environment, and designing any necessary policies and procedures.	Provides the coalition teams with the tools to be successful in pursuing their key focus areas.	<ul style="list-style-type: none"> <li>• Differences in cultures across members are identified</li> <li>• New norms for the coalition overall are established</li> <li>• Culture building activities exist to support improved group cohesion</li> <li>• Empathy is embraced by members as they work to launch teams that may need time to 'storm' 'form' and 'norm'</li> <li>• Launch the coalition teams with a workshop</li> <li>• Design a process for collaboration and review across leaders from the coalition members</li> </ul>

# Communications & Outreach

A focused communications & outreach strategy across coalition members and external stakeholders can increase collaboration and potential for impact

	Description	Impact on the Coalition	Leading Practices
<b>Communications</b>	Internal practices, language, and channels that enable coalition collaboration	Enables efficient collaboration while clarifying key priorities / goals and expectations on delivery	<ul style="list-style-type: none"> <li>• Communications plan matches key stakeholders to information most important to their decision-making</li> <li>• Alignment of members to communications plan is in place and plan has been validated</li> <li>• Key terms are used consistently by different members in all internal communications</li> <li>• Roles and responsibilities are clearly defined across members – all members have accountability for their roles in the process</li> <li>• Tools are accessible by all coalitions – free resources used where possible</li> <li>• Communications team utilized across members to connect organizations, manage access and technology, etc.</li> </ul>
<b>Outreach</b>	Distinct and consistent external communication that fosters public understanding of and support for the coalition	Sets the intention of public outreach, distinguishes the actions of the coalition from individual members and builds public understanding of the coalition	<ul style="list-style-type: none"> <li>• Outreach plan matches key stakeholders to information most important to their decision-making</li> <li>• Defined role for and expectations of leadership in any external outreach and make sure they are prepared to have efficient and effective conversations with stakeholders</li> <li>• Goal / purpose of publicity is clear and outreach is tailored to these goals</li> <li>• Communications are inclusive of various mediums for those without internet access or who are in different areas of the community</li> <li>• Utilizes an outreach office to support management of outreach efforts across various members in the coalition</li> </ul>

# Project Management

PMO efforts ensure that coalition efforts remain aligned to plan and that roles & resources are appropriately allocated

	Description	Impact on the Coalition	Leading Practices
PMO	Processes, tools, and guiding principles to enable successful execution of vision & goals across coalition work streams	Enables effective and regular coordination between members while building a culture of accountability to proactively address and escalate issues and drive stronger alignment	<ul style="list-style-type: none"><li>• Phases, deliverables, key milestones and success criteria are defined for each group involved</li><li>• Project roles are formalized and understood by team members</li><li>• Project requirements, objectives, risks, and scope are clearly documented and socialized early in the project life cycle</li><li>• Regular tracking and cadence for coalition alignment are established so that risks, issues, and deviation from project plans are addressed in a timely manner</li><li>• Quality standards are defined and performance is evaluated against requirements throughout the project lifecycle</li><li>• Resource and budgetary constraints are identified and mitigated appropriately</li><li>• Process to escalate issues is established with a risk response team ready to mobilize</li></ul>





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