STATE OF LOUISIANA
RESILIENT LOUISIANA COMMISSION
INFORMATION TECHNOLOGY & COMMUNICATIONS TASK FORCE

Charge 1: Crisis Response Assessment and Recommendation Report[1]

Document Purpose:

This document presents COVID-19 related impacts and recommendations, as collected from the Information Technology and Communications (ITC) Task Force associated with the Charge 1 Questions outlined in the Resilient Louisiana Commission (RLC) Task Force Guidance document. Section 1 outlines the immediate or near term recommendations that have been gathered from the ITC Task Force. Section 2 outlines the feedback and input across all of the Charge 1 Assessment questions.

Section 1: Charge 1, Immediate or Near Term Action Items Assessment

	Immediate or Near Term Action Items Assessment	
No.	**Brief Description**	**Details**
1.	Consistency of re-opening guidelines	• Re-opening guidelines should specifically incorporate CDC guidelines and practices; doing so will allow a consistent approach based on expert advice. • To the extent states adopt their own principles, they should do so on a region-wide basis to provide consistency for businesses with employees that travel across state boundaries for work and commuting purposes. • Where states and localities in the same region are not on the same reopening timeline, adopting consistent terminology and guidelines for each phase (e.g., the parameters for Phase 1 are the same in Illinois as they are in Michigan) will provide some degree of uniformity to what is likely going to be a complicated situation.
2.	IT/Communications Displaced Worker Programs	• Recommend examining what types of resources, communication or otherwise, might be rapidly deployed when/if technology based workers are impacted by the pandemic within the State. Consider establishing support mechanisms to quickly connect impacted tech workers with other tech companies on a regional or a statewide basis who may be hiring in order to retain this hard to find talent within Louisiana. • Apply a similar lens to upcoming college graduates who may experience potential downturn in demand for tech sector employment given the possible trends being reported from various hiring related websites as noted above.
3.	Cross-Sector Broadband Collaboration	• Leverage existing expertise of the State of Louisiana's Broadband for Everyone in Louisiana (BEL) Commission, paired with the resources (e.g. CARES act) and engagement from economic sectors of the RLC to develop immediate action items that accelerate broadband access across the state.

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[1] Note that this document will be reviewed for approval by the ITC Task Force during the ITC Task Force meeting on 5/11.

	Immediate or Near Term Action Items Assessment	
No.	**Brief Description**	**Details**
4.	Cybersecurity resource capacity for targeted economic sectors	• Leverage work and support from the Louisiana Cybersecurity Commission to develop near/long term roadmaps for establishing programs that create cybersecurity capacity for sectors that need assistance (non-profits, education, local government)
5.	CARES Act + IT/Communications Analysis	• Engage resources to examine funding paths via the CARES Act that include the Coronavirus Relief Fund, Non-Competitive CARES Act Grants, and Competitive CARES Act grants to determine how these funding sources can support initiatives related to broadband, cybersecurity, and IT/Communications Workforce and Economic Development related initiatives.
6.	Communication Sector Access to PPE	• As an essential business providing a variety of essential services including telecommunication and broadband services, business has not stopped. However, modifications were implemented related to installation and repair process and customer service center operations due to rising COVID 19 cases and a lack of supplies available for purchase. Sufficient availability and supply of PPE, disinfectant including disinfecting wipes, and hand sanitizer is an immediate resource needed for efficient and effective operations.
7.	Liability Protection	• Clarity and guidance on liability protection will be helpful during re-opening phases.
8.	Spreading awareness of telecom company offerings that will support the reopening of businesses in LA.	• A number of technology solutions in addition to enterprise and residential high speed internet service are available to support businesses and citizens of the state as they transition to the "new normal." Not all stakeholders are fully aware of these capabilities or offerings. Mechanisms to help educate the public and businesses on how these capabilities can accelerate recovery will support the overall recovery of the state's economy.
9.	Child-Care Services and Solutions	• As phased re-opening of the state's economy occurs, and both IT and Communications employees return to work, child care solutions for employees that cannot work from home will be needed.
10.	Streamlined Permitting	• Recommend considering a streamlined permitting processes to quickly and thoroughly review and approve infrastructure placement related to telecommunications infrastructure.
11.	Working from Home Training Resources	• Additional training resources to address challenges and maximize such opportunities to enable employees to work from home would be beneficial.

Section 2: Charge 1, Assessment Questions

Charge 1: Crisis Response Questions. To issue industry-specific recommendations to respond to crisis needs as they evolve and to help safely implement any COVID-19-related orders of the Governor. ITC Task Force members responded to the set of questions outlined in the RLC Guidelines based on individual impacts being felt within each Task Force member's organizations, as well as using various industry analyst impact studies and assessments.

No.	Question	Feedback

1.	What is the ongoing impact of COVID-19 on your industry/sector(s)?	**Information Technology Assessment**
		• Across most of the IT industry (except in places where client or business requirements "mandate" an onsite presence), technology based jobs transitioned quickly to work from home models. This indicates a high level of resilience in this sector. This is enabled and dependent on a few key areas.
		    o Strong Telecom Networks: Supported by a strong telecom network available everywhere and one that scales with demand
		    o Hardware & Software: Laptops and Mobile equipped workforce that provides teams true enterprise mobility and an ability to support customers missions without disruption
		    o Security: Education on leading practices and leveraging secure technologies and process to allow the home to be an extension of the office, enabling employees to deliver consistently
		• In a number of cases, IT service/consulting companies have been involved in several short term COVID-19 responses to help citizens and business. These surge efforts have varied in nature depending on the industry vertical they are supporting.
		• In the IT Consulting subsector, there is a growing impact, in some cases being felt in varying degrees based on the size of the IT Consulting provider (as has been noted in some industry analyst reports) which requires attention. Employment challenges are occurring as a result of existing consulting projects that have been cancelled and/or the cancellation (or "pause") of upcoming projects. In larger IT Consulting operations, employers may be able to shift across a broad number of industry or government sectors, potentially dulling this impact. This may not be possible for small to mid-size IT Consulting firms, resulting in potential reductions in force. The next bullet and noted sources elaborate on this potential impact which may cascade into larger IT Consulting subsector firms depending on industry sector.
		• A number of industry studies and reports are indicating that CxOs across many industry verticals are examining long term spending/investments related to IT in the wake of the pandemic. The impacts to technology investments are expected to vary based on a number of dynamics:
		    o IT investments for planned digital transformation projects may be impacted within certain industry verticals.
		    o Mission critical, "run the business" technology investments will be more resilient
		    o Digital transformation efforts that were underway pre-COVID-19, which are mission critical and increase digital presence or represent increased value/reduced costs are continuing.
		• Investment areas that are accelerating include a focus on cloud migration (and cloud infrastructure services generally), cybersecurity, business automation, specialized software, remote work infrastructure and services, etc.
		• IT companies with diversified portfolios and client bases may have increased resilience as work shifts across industry verticals or from planned digital transformation activities towards scaling critical mission operations.
		• Organizations are examining their IT workforce and manufacturing supply chains – and regional containment zones have created bottlenecks impacting value creation work streams.
		• Widespread cancellations of tech conferences will negatively impact growth as the sector has relied heavily on these types of events for networking related to demand generation and business development.

No.	Question	Feedback

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- Industry reports from April indicate a range of impacts on hiring trends in the tech sector, with Glassdoor showing a decrease occurring from March to April but Indeed indicated a YoY increase in various geographies. Trends will need to be monitored to assess where there are resilient pockets across industry verticals or within various horizontals.
- According to a recent Yello survey, 35% of students who've accepted summer internships learned the internship was canceled, and 24% of students have been told their internship will be virtual. This data was not broken down by industry sector but would be interesting to monitor and assess for the tech industry given the ability for the tech sector to support WFH arrangements.
- In some sectors, there is increased demand for "elastic workforces" that can work remotely and be scaled up and down quickly in response to demand.
- *Sources:*
  - https://www.pwc.com/us/en/library/covid-19/pwc-covid-19-cfo-pulse-survey.html
  - https://www.pwc.com/us/en/library/covid-19/coronavirus-technology-impact.html
  - https://www.ciodive.com/news/coronavirus-covid-19-IT-technology-market-2020/575950/
  - https://www.ciodive.com/news/2019-IT-employment-US/576463/
  - https://www.consulting.us/news/4008/coronavirus-may-hugely-impact-us-consulting-market
  - https://www.cnbc.com/2020/04/23/tech-companies-pull-back-on-hiring.html
  - https://www.forbes.com/sites/jackkelly/2020/03/27/thousands-of-new-jobs-are-being-created-in-response-to-the-coronavirus/#39d0cc893d3f
  - https://www.techrepublic.com/article/report-35-of-summer-internships-canceled-due-to-covid-19/
  - https://www.marketdataforecast.com/blog/impacts-of-covid19-on-information-technology-industry
  - https://go.forrester.com/blogs/new-forrester-forecast-showsglobal-tech-market-growth-will-slip-to-3-in-2020-and-2021/ *(Pre COVID-19 forecasts for tech sector market growth)*

Communication Assessment
- Teams are closely monitoring developments in the coronavirus (COVID-19) outbreak and are taking the appropriate steps to help maintain the ongoing health and safety of our employees and customers. Communication providers remain fully committed to supporting our customers and the broader society during this challenging period.
- Multiple communication providers in Louisiana have signed the Keep Americans Connected Initiative Pledge in order to "…ensure that Americans do not lose their broadband or telephone connectivity as a result of these exceptional circumstances."
  - Link: https://www.fcc.gov/keep-americans-connected
- Companies are providing a number of emergency bandwidth upgrades to government customers.
- COVID 19 has resulted in an increased demand for broadband and telecommunications services. More consumers need connectivity at their homes to support work from home and distance learning. In addition, more people being at home has contributed to rising broadband usage for delivery of over the top content. Lack of broadband in rural and in some urban environments has created challenges for telehealth, distance learning, and digital cutover for small businesses who lack connectivity or necessary skillsets.
  - Third party assessment of broadband demand spike: https://www.fiercetelecom.com/operators/due-to-covid-19-broadband-usage-spikes-47-q1-nearly-surpassing-all-2020-s-projections

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		• Not all financial impacts are determinable at this time; however, we companies are closely monitoring impacts to their customer base to assess near and long term trends.
		 • Providers are minimizing in-home installation work to critical scenarios in order to keep employees and customers safe and to reduce the spread of COVID-19. Every attempt is being made to perform work without going into homes or small businesses. New installs are limited to medical emergencies and critical installations. In some cases, this means that technicians will repair services up to where the service enters a consumer's location, and will then have to work with the consumer to troubleshoot and support self-repair on any required work inside a home or business.
		 • For employees who must deploy outside their homes to meet critical customer needs, some providers have implemented significantly enhanced compensation plans.
		 • In some cases, massive employee transition plan plans to re-train and re-deploy thousands of retail employees to work-from-home functions are underway.
		 • In some cases, comprehensive coronavirus leave of absence policies have been implemented. One example:
		     o Those who contract the virus are eligible for up to 26 weeks paid leave.
		     o For employees caring for someone who's been infected, for employees directed to stay home due to an underlying medical condition and for employees who have trouble finding childcare at this time, 8 weeks of pay at full pay and, if needed, an additional six weeks with 60% of their base wage
		 • Providers have seen increased demand and are leveraging capabilities to conduct virtually any business transaction can now be handled remotely.
		 • Resources and capabilities for handling customer inquiries, sales and troubleshooting using online tools have been increased dramatically.
		 • The majority of communication providers' corporate-owned retail locations are now closed. A handful of employees continue to work from some offices due to the nature of their work, with procedures in place for social distancing, handwashing and sanitizing.
		 • Operating hours for retail stores that remain open have been reduced (and in some cases are now closed on Sundays).
		 • Networks continue to perform well. In areas where the coronavirus has had the biggest impact, fewer spikes are being observed in wireless usage around particular cell towers or particular times of day because more people are working from home rather than commuting to work and fewer people are gathering in large crowds at specific locations.
		 • Continuously monitoring bandwidth usage with tools that analyze and correlate network statistics, which reveal network trends, and provide performance and capacity reports that help manage networks.
		 • Self-healing architectures and restoration technologies are helping to maintain reliable networks
		 • Actively monitoring wireless voice and data traffic changes daily – flexible network capacity has been a key component to supporting customers throughout the pandemic thus far.

2.	How has your industry/sector(s) operated during the Stay at Home order (distinguishing between essential	**Information Technology Assessment** • The vast majority of workforces in the IT sector in Louisiana successfully transitioned to work from home when the State's Stay at Home order was put into place (some even before that occurred). The remaining small percentage are typically supporting critical infrastructure or clients that, due to various constraints, cannot be supported in a Work from Home context. In some cases, for IT Consulting firms specifically, transitioning to Work from Home patterns did require discussion and agreement from clients as some IT Consulting contracts may stipulate specific work location requirements.

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	service and non-essential service businesses)?	• In cases where staff whose jobs duties qualify as essential activities pursuant to the Proclamation and Cybersecurity & Infrastructure Security Agency ("CISA") Guidelines, employees continue to work flexibly within the office but if possible, out of their homes, to maintain the operation of critical operations, and to continue to perform the information technology services for government customers. • Business Continuity Plans and Crisis Management Team frameworks that were in place pre-pandemic were immediately put into place and helped accelerate the transition to working from home for many of the larger IT companies in this sector. • Based on various research firm reports and contacts across our peer network, this trend appears consistent and reflects a high degree of immediate, short term, and long term resiliency with this sector (with no degradation of services for clients being reported in the IT Consulting portion of this sector), especially when combined with highly transferable skills across industry verticals. In addition, many companies in the software development space employed remote workers pre-COVID-19, so the transition to a fully remote staff hasn't been as disruptive like with other sectors during the immediate impact of the Stay at Home order. **Communication Assessment** • As a critical infrastructure providers and deemed essential business, communication providers have continued to operate as appropriate and as authorized by federal, state and local standards during the Stay at Home Order. This includes maintenance of existing network assets, deployment and construction of new network assets and telecom retail – all operating BAU. • The safety of communication sector employees has been a top priority, while continuing to support this critical infrastructure sector. • For employees that can, many are working from home. For those who are unable to work from home, communication providers have been providing personal protection protocols and equipment. • Corporate operation (non-essential services) employees are working remotely and most corporate offices have been closed. • Some providers have scaled back to a limited number of retail stores that have remained open, reduced operating hours, adopted measures to maximize touchless interactions and the use of PPE and additional sanitation measures to ensure the safety of employees and customers.
3.	What are the concerns from your industry/sector(s) that need to be addressed prior to reopening the economy?	**Information Technology Assessment** • Related to re-opening, large IT firms have defined strategies that will support a staged/wave reintroduction of their workforce that is sensitive to the various geographical locations of their teams, government guidance/requirements, and nature of work being performed. These companies will look to align with state/local requirements as they are issued, and as they align with the various planned waves of their workforce's re-entry into their facilities. In the interim, their employees will continue to operate in Work from Home (WFH) patterns. • Clarity and guidance on liability protection for small to mid-size businesses will be helpful during re-opening. **Communication Assessment** • Continued concerns regarding safety of both employees and customers are the highest priority. • Related to the above, access to adequate supplies of PPE, disinfectant (for equipment and related installation and office space sanitization) and hand sanitizer are needed prior to returning to normal operations.

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		• State or local regulatory constraints that may impact effective and efficient deployment of services should be examined. • Recommend considering a streamlined permitting processes to quickly and thoroughly review and approve infrastructure placement. • It is critical to make sure that providers have the ability to participate in COVID-19 related legislation and ordinance discussions at a state and local level that impact the industry. • Liability protection for businesses who follow currently known and published best practices that are available (provided by OSHA, the CDC, or the state) will be important to support confident re-opening of businesses across the state.
4.	What are the areas of concern unique to your industry/sector?	**Information Technology Assessment** • In the short/near term, recommend examining what types of resources, communication or otherwise, might be rapidly deployed when/if technology based workers are impacted by the pandemic within the state. Given the high demand for a highly skilled STEM workforce in the state, and the high likelihood of returning to a scarcity model in the future, it is critical that Louisiana retain this talent within the state as it becomes impacted. While these jobs, as noted above, have proven to be particularly resilient in the near term, second and third wave economic impacts may impact our state's tech workforce in certain sectors. Establishing support mechanisms (and strengthening/augmenting existing mechanisms) to support those impacted to connect displaced tech workers to other tech companies not impacted may be critical. • It will be important for organizations within the IT sector to be monitoring multiple industry verticals for possible shifting in technology investment decisions as noted in response to question 1. Building resilient business models/operational frameworks to protect from these disruptions will be important. • Additional discussions and public policy should be considered related to benefits and protection for gig workers. • Related to support for other sectors of Louisiana's economy, our sector anticipates the following trends that will impact demand for IT services and Technology skills within the state: o Empower remote workforces via technology platforms, policies, and best practices, including enabling remote access to any and all critical business resources and assets o Shifts across multiple sectors to focus on virtual citizen and customer engagement o Implementation of technology services to accelerate business/government agility and efficiency while continued budget pressures are felt due to the long term effects of this crisis o Increased demand for services related to the protection against new cybersecurity risks o Reduce operational costs and enhance supply chain continuity o Large increases (and shifts) in demand related to supporting health providers and government services. **Communication Assessment** • Access to rights-of way (city, parish and state) for the purposes of network maintenance, enhancements and construction, also specifically avoiding express or implicit moratoriums that prohibit access to rights-of-way • Recommend considering a streamlined permitting processes to quickly and thoroughly review and approve infrastructure placement. • Public policy efforts that either directly or indirectly create additional mandates related to customer billing and repayment, as these types of prescriptive mandates are difficult to comply with.

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No.	**Question**	**Feedback**
		• Connectivity demands require that focus on the densification of mobile networks to ensure capacity to meet customer demand while laying the framework for future technologies like 5G and the Internet of Things. Deployment of small cells, miniature cell sites, allow management of increased network demand while improving connectivity. This sort of connectivity is of particular importance given demands placed on connectivity from anywhere, at any time, underscored by a dramatic increase in mobile network data consumption over the last decade. This connectivity is especially important for first responders, who need to efficiently and effectively coordinate and communicate their emergency response during crisis events. Ensuring new infrastructure is appropriately permitted and approved in a timely fashion, while keeping the safety and health of our employees and customers as a priority, will be critical to the long term resilience of Louisiana's economy.
5.	What are your assessments on current employment, anticipated re-employment following reopening the economy, and workforce training needs?	**Information Technology Assessment** • Current employment: ◦ Generally speaking, it appears that the IT sector in Louisiana is being impacted in specific pockets where hard hit industry verticals intersect with technology employment. This is also being observed in the small to mid-sized IT consulting services subsector, and may possibly impact larger businesses depending on the scale and duration of secondary and third wave impacts. However, in other industry verticals, the IT workforce and current employment has not been as heavily impacted. ◦ It is possible that in sectors where continued downsizing is occurring (as companies struggle to accurately predict cash flow because of uncertainty in supply chains/demand), that this will have a ripple effect into IT budgets and impact the workforce. • Re-employment: ◦ Aligning with the responses in question #4, we would anticipate spikes in demand in the near term for certain skillsets (e.g. cybersecurity) as well as across many areas in the long term (especially as supply chain and demand for cross-sector services/products becomes more predictable), even while there may be employment contraction in some industry verticals. ◦ To support re-employment, it is critical to determine what IT/Communication specific programs can be established to connect, train, and retain displaced tech workers with companies/organizations that are not impacted. ◦ Specific attention should also be paid to trends that emerge related to recent graduates from higher education programs given some of the trends emerging in recent job opening statistics. ◦ Related to on-boarding, multiple IT companies in the state have continued to hire and onboard new employees. Activities related to sourcing candidates, interviewing, hiring, and onboarding of new employees are all occurring in remote/virtual patterns with little to no risk. • Re-training: ◦ Given the potential resilience associated with technology related jobs, a strategic focus on training pathways within STEM fields or from STEM-adjacent fields should be considered. ◦ Sector-specific training and guidance on proper safety measures will be needed for IT workers across multiple sectors. ◦ Across multiple sectors, best practices for working remotely need to be established, with a focus on cyber-security

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No.	Question	Feedback
		Communication Assessment • The safety of communication sector employees has been a top priority while continuing to support this critical infrastructure sector. • For employees that can, many are working from home. For those who are unable to work from home, communication providers have been providing personal protection protocols and equipment. • Ongoing rolling assessments related to employment impacts are still occurring in some cases and concrete determinations have yet to be made. As of this point in time, based upon continued demand and initial increased demand for our services, employment levels have generally remained the same. There is uncertainty regarding economic recovery following reopening of the economy and that could impact our customer's ability to pay. • Effort is being made to provide training resources for remote workforce management of employees. The shift in the workforce to work from home brings with it different challenges and opportunities. Additional training resources to address such challenges and maximize such opportunities would be beneficial.

6.	What information and resources on Continuity of Operations Plans and information from state and national health resources will be essential to share as a first step to supporting the return of existing business?	**Information Technology Assessment**
		• Current information sources from Federal and State resources are meeting immediate needs and being leveraged by Crisis Management Teams (CMT) within large businesses.
		• Regular communication that provides relevant content around testing, contact tracing, identification of hot spots in real-time but also via email, newsletters, and social media.
		• Strong engagement through an aligned multi-level approach to clarify policies and frameworks for getting back to work. This includes coordinated messages from the Governor, Louisiana Economic Development (LED), and local mayors to company's executive leadership such as sending regular updates on legislation, health and safety guidelines, and best practices around COVID.
		• Clarity on the intent to open up the economy and concrete steps (with dates) may resolve some market uncertainties that are impacting investment decisions that are creating downstream employment impacts as noted above.
		• Within the context of technology as an enabler across various industry verticals and economic sectors, resources for COP that may be useful include:
		    ○ Resources for cybersecurity assessments/capacity for smaller businesses, non-profits, and local governments. Specific focus on organizations that may be hard hit in this economy and may not be able to dedicate resources to cybersecurity should be a priority (e.g. non-profit and education sectors)
		    ○ Best practices and guidance aligned with various scenarios as we progress through phases of re-opening. For example, as a phased reintroduction of the workforce occurs, if an employee contracts the coronavirus, what types of actions, checklists, recovery operations will be the most effective?
		    ○ Resources that train employees on how to use PPE properly and consistent guidance on appropriate safety measures.
		
		Communication Assessment
		• Current information sources from Federal and State resources are meeting our needs and being leveraged by our Crisis Management Team (CMT). In addition, continued information on the status of the state's phases related to the White House/CDC Opening Up America Again and related state status and orders is critical to our internal return to office planning.
		• Continued daily data on positive tests on a parish by parish basis is essential to evaluate the current risk associated with COVID-19 in each community. That data will be needed until a vaccine is available and effective.

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		• An additional reference being utilized for guidance is The Business Roundtable.
		    ○ A key aspect of the Business Roundtable guidelines is having states incorporate CDC guidelines and practices; doing so will allow a consistent nationwide approach based on expert advice.
		    ○ To the extent states adopt their own principles, they should do so on a region-wide basis to provide consistency for businesses with employees that travel across state boundaries for work and commuting purposes.
		    ○ Where states and localities in the same region are not on the same reopening timeline, adopting consistent terminology and guidelines for each phase (e.g., the parameters for Phase 1 are the same in Illinois as they are in Michigan) will provide some degree of uniformity to what is likely going to be a complicated situation.
		    ○ Link: https://www.businessroundtable.org/business-roundtable-outlines-principles-for-safe-recovery

7.	What are immediate resources needed to re-start businesses?	**Information Technology Assessment**
		• Support in establishing new operating models to address the essential mission needs of our customers while ensuring the safety, security and capability of employees despite a pivot from onsite to flexible work site
		• General guidelines for smaller businesses or organizations who may not have a CMT framework/capacity may be needed around topics such as:
		    ○ How to support social/physical distancing (and other "Safe to Work" policies) within typical office environments where technology related support is conducted (whether it be software development, tech support, or other business models).
		    ○ Previous trends in the industry for open office layouts and desking arrangements that shifted away from cubes (which create some natural barriers between employees) may need to be re-examined.
		    ○ Easier access to PPE
		• Child care solutions for employees that cannot work from home will be needed as the state progresses through phases.
		• If re-opening does not occur soon, additional SBA PPP loan forgiveness may be needed.
		
		Communication Assessment
		• Responses to each of the seven questions above were posed to members of the Louisiana Telecommunications Association for feedback. Though some companies had minor operational differences for their employees, the impact, status and needs of all companies were consistent among the respondents. The answers provided above are representative of that segment of the telecommunications market.
		• As an essential business providing a variety of essential services including telecommunication and broadband services, business has not stopped. However, modifications were implemented related to retail, installation and repair process, and customer service center operations due to rising COVID 19 cases and a lack of supplies available for purchase. Sufficient availability and supply of PPE, disinfectant including disinfecting wipes, and hand sanitizer is an immediate resource needed for efficient and effective operations.