Agility Recovery

Guide

Renovation & Remodel Continuity Toolkit

A three-phase guide to keeping your credit union running through renovations, remodels, relocations, and planned outages.



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Table of Contents

Introduction 2

Phase 1: Pre-planning 3

Phase 2: Preparation 4

Phase 3: Temporary Operations 5

About Agility Recovery 6

Introduction

Unlike emergency disaster recovery scenarios, planned renovations, remodels, relocations, and outages provide credit unions with the advantage of preparation time. This toolkit is designed to help organizations use that lead time strategically to minimize disruption, maintain operational continuity, and support a smooth transition into temporary operations.

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Phase 1: Pre-planning

Know before you go

Effective business continuity during a remodel or renovation event starts months before operations are impacted. The goal of pre-planning is to **understand exactly what your credit union needs to maintain operational continuity, establish clear decision-making authority, and put vendor agreements in place** before urgency drives the conversation.

Most credit unions discover their dependencies too late—when a contractor's timeline slips or a permit is delayed. Pre-planning eliminates that risk.

Define your operational continuity requirements

- **Define your recovery time objective (RTO):** How many hours can operations pause before revenue loss, compliance risk, or member impact becomes critical?
- **Map critical vs. deferrable functions:** Which processes must continue on day one, and which can pause 48-72 hours?
- **Conduct a single-point-of-failure assessment** across facilities, systems, and personnel
- **Identify regulatory and compliance requirements** that cannot lapse (credit union opening hours, NCUA requirements, etc.)

Establish ownership and budget

- Assign a continuity lead and a backup contact—one person accountable across all three phases
- Establish a business continuity budget and get leadership sign-off before disruption begins
- Document vendor and supplier SLAs and escalation paths that will be affected during the disruption

Engage vendors early

- Begin vendor conversations as early as possible; workspace, equipment, and connectivity all have lead times
- Understand your options: mobile recovery centers, temporary branch space, cloud-first remote deployment, or a hybrid approach
- Review a vendor readiness scorecard when evaluating providers

> **Agility Tip**
> Put your recovery provider (Agility Recovery) on alert before your planned disruption date—not after. Agility's recovery managers can walk you through cost/benefit scenarios and place equipment on standby to streamline transition timelines and minimize operational downtime.

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Phase 2: Preparation

The 30-day countdown: Transition readiness

With your transition date confirmed, shift from strategic planning to operational preparation. The 30 days before a planned outage or branch closure are your window to lock down workspace, test systems, and communicate proactively. Members and staff should never be surprised.

The most common preparation failure is treating communications as an afterthought. Build your member and employee messaging early and give yourself time to revise.

Workspace and infrastructure

- Confirm your temporary workspace strategy: mobile recovery center, temporary office, remote work deployment, or cloud first
- Verify permitting and site access requirements for any temporary structures
- Test backup connectivity (satellite, LTE failover, VPN access) before disruption day, not during
- Verify data backup and cloud recovery are current; run a test restore
- Stage portable equipment: laptops, phones, printers, backup power supplies

Communications

- Draft member-facing communications: signage, email, website notice, and social media
- Send advance notice to members at 2 weeks and again at 2-3 days before disruption
- Brief all staff on recovery site location, parking, access credentials, schedule adjustments, and communication expectations
- Forward main phone lines and update hold messages, IVR, and directory listings

Credit union considerations

- Confirm cash supply, compliant safe, night drop, and ADA accessibility
- Document NCUA compliance
- Run a tabletop exercise with your recovery team and walk through the first days of temporary operations out loud

> **Agility Tip**
> Agility's mobile bank branches arrive ready with climate control, a drive-up window, employee workstations, teller stations, a compliant safe and night drop box, ADA accessibility, and more. Special permits aren't always required and they can be operational within 24 hours of deployment.

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Phase 3: Temporary Operations

Run the playbook

Your branch is closed, but operations continue. This phase is about maintaining operational stability: daily communication, consistent issue tracking, and proactive planning for your return. The credit unions that handle planned disruptions best are the ones that treat the recovery workspace as their real workspace.

Start planning your return before the renovation is complete. Waiting until the last week creates a second disruption at the end of the first one.

Day-to-day operations

- Confirm recovery workspace is operational and all staff have access before business-open time on day one
- Run daily 15-minute standups with the continuity lead: what's working, what's broken, what needs escalation
- Maintain a running issues log with date, issue, owner, resolution, status (use the daily operations log included in this toolkit)
- Monitor connectivity and IT systems hourly in the first 48 hours; daily thereafter

Compliance and documentation

- Maintain audit-ready records of all operations conducted during the disruption period
- Track costs against your continuity budget; document for insurance or tax purposes
- Send weekly internal updates to leadership with operational status and any timeline changes from the contractor

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Planning your return

- Begin return-to-facility planning at the halfway point of your disruption, not the last week
- Confirm the facility return date with your contractor and communicate any updated timeline to staff and members
- Verify IT reconnection, security systems, and compliance re-certification before reopening
- Schedule temporary operations equipment removal and conduct a final walkthrough with your vendor
- After return: conduct a lessons-learned review and update your business continuity plan

> **Agility Tip**
> When your brick-and-mortar is ready, Agility handles equipment removal completely. Schedule your return with your recovery manager at least two weeks in advance to ensure a clean, same-day transition back.



About Agility Recovery

Agility Recovery has been helping credit unions plan for and recover from business disruptions for over 35 years. Our solutions span backup power, mobile recovery centers, workspace recovery, technology and connectivity deployment, cloud and DRaaS services, and purpose-built financial institution recovery through ReadyFinancial+.

Whether your disruption is planned or unplanned, our team is available to scope your needs, put equipment on standby, and deploy within hours of a declaration. Reach out to your Agility representative or visit agilityrecovery.com to learn more.

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Agility Recovery takes action to get your business back on its feet after any disaster, providing you with comprehensive support and resources when you need it most. Our end-to-end solutions are fully customizable to meet the unique needs of your business and protect against interruptions large and small – from major natural disasters to planned renovations. Whatever it takes to keep you in business, that's what we do.

Visit our website for more information.

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