Brock Fritze

Fargo Cass Public Health  4611 15th Ave N Fargo, ND 58102

Business Continuity

**Version History**

Enter Distribution/Update List information for tracking those who receive or update the BCP in the following table. Please note, this page may be left blank and the information added as each copy of the plan is distributed or updated.

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| Version # | Implemented By | Revision Date | Approved By | Approval Date | Reason for Update |
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**Confidentiality Statement**

The access to the business continuity plan should be strictly controlled. Company data includes private personnel data, proprietary patents and designs, and marketing information. The information in this plan is distributed only to company personnel with a “need to know” and with the understanding that they will hold this information confidential and will not disclose any information in this plan to third parties without the prior written consent of the company or the filing by the third party of a binding non-disclosure statement that has been vetted by the legal department.

**Business Continuity Plan Distribution/Update List**

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**Chapter 1 – Overview and General Information**

**1.1 Overview**

Example: This is the Business Continuity Plan for the XYZ Company. The information in this plan is intended to guide the company during natural and manmade disasters that impact our ability to conduct normal operations. Chapter One includes general information on the purpose, scope, objectives, and assumptions used in the development of the remainder of the plan. Chapter One also includes risk assessments, a summary of our Business Impact Analysis, organizational structure, and Business Continuity Team organizational structure.

**1.2 Scope**

Example: The scope of this Business Continuity Plan is limited to the business offices of XYZ Company, 1212 Maine Ave, Anywhere, XX, 99999.

**1.3 Business Continuity Program Policy**

Questions to ask when making your business continuity policy:

* How does your business define business continuity?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What is the title of the person responsible for overseeing and implementing your business continuity Program?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* To whom in the senior management chain does this person answer?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* How does your business approach business continuity?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What level of resources, maintenance, and budget is your company willing to business continuity planning and preparedness?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* How will your company execute its business continuity program and communicate expectations throughout the organization to suppliers, subcontractors, and vendors?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* What are the Business Continuity Program responsibilities and requirements for each functional area within the organization?
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*For more room, adding on pages for space is recommended.

**1.4 Planning Assumptions:**

As you begin the planning process and work through the steps, you will make certain assumptions. Your assumptions will determine under what circumstances your organization will recover. Your assumptions will be specific to your organization and can be as detailed as you make them. You cannot plan for everything but you can plan for most events if you have certain elements in place. It is vital that you record these assumptions as they will influence, facilitate, or limit responses during an actual disaster, and you may not be available to explain what assumptions were made.

|  |  |
| --- | --- |
| # | Assumptions |
| 1 |  |
| 2 |  |
| 3 |  |
| 4 |  |
| 5 |  |
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| 8 |  |

**1.5 Objectives:**

* What is the goal and focus of your business continuity plan?
* What is the scope of your business continuity plan? Will it cover the entire company or just one location?
* What kind of events will the business continuity plan address? Make sure you define the kind of events and the impact that may result when developing your plan.

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Objectives Cont.

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**1.6 Risk Assessment**

A key element of business continuity planning is risk assessment. You use risk assessment in your day-to-day operations even if you don’t think of it that way. It is a management tool that will help identify business continuity risks. Begin by asking your team some questions about the processes you use every day. Here are some sample questions to get you started:

* What is your “early warning system” for identifying business risks?
* What is your cross-business/cross-function risk assessment process to identify, assess, and prioritize events with consequences that impact operations?
* What is your process for making decisions regarding identified risks for recommended mitigation, and transferring or accepting risk (insurance – assess property risks, etc.)?
* How does the business report these risk assessment findings and plans to your senior leadership?
* Take the responses to these questions and develop a risk assessment table for your Business Continuity Plan. While you may be examining several types of risks, you will still use the same thought process. You may utilize the sample table below as a guide for filling out your own risk assessment table for your BCP.

The following table uses three elements to assess risk:

Key

|  |  |  |
| --- | --- | --- |
| Probability Scale | Business Impact Scale | Control Scale |
| 1 – 2 – 3 – 4 – 5 | 1 – 2 – 3 – 4 – 5 | 1 – 2 – 3 – 4 – 5 |
| Low…………………High | No Impact…………High Impact | Good………………Poor |

Probability Scale: The likelihood that an event will occur.

Business Impact Scale: The degree to which the event will affect your business.

Control Scale: How much control you have in preventing the event.

Threat List:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Threat | Probability Scale | Business Impact Scale | Control Scale | Ideas For mitigation |
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**Threat List Cont.**

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| # | Threat | Probability Scale | Business Impact Scale | Control Scale | Ideas For mitigation |
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**1.7 Business Impact Analysis**

* Determine mission/business processes and recovery.
* Identify resources requirement.
* Identify recovery priorities for system or business resources.

Briefly describe your Business Impact Analysis process. What areas did you include in your analysis? What did you leave out? Why? Describe how your business determines what mission critical business processes and interdependencies (regulatory, applications, suppliers, contractors, etc.) require business continuity and/or disaster recovery planning. Provide a list of organizational considerations used to evaluate processes.

\*Attach business impact analysis

**Business Impact Analysis Summery**

Now that you’ve described the process, you need to summarize the outcomes. This table provides a summary of the most important data obtained from the BIA such as the business unit, responsible manager, process/business function, recovery time objective (RTO)[[1]](#footnote-1), and estimated daily financial losses. It is also useful to create a spread sheet with this information so that you can easily sort it to generate answers to any questions that may arise.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| # | Business Unit | Manager | Process | RTO | Daily Loss | Function | Risks | Comments |
| Example | Finance | John Doe | Health | >48 hours | $1237 | Nurse | Affected by risks: 1, 2, 3, 4 |  |
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| # | Business Unit | Manager | Process | RTO | Daily Loss | Function | Risks | Comments |
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**1.8 Business Continuity Strategy**

After you have completed the BIA, it is a best practice to document a formal Business Continuity Strategy and have it approved by senior management.

\*Your Business Continuity Strategy can be as simple as:

*In the event of a declared disaster affecting XYZ Company’s business offices, business operations will utilize the XYZ Business Recovery Center located at 1234 Brown Street, Any town, XX 99999.*

*Contact information for the XYZ BRC is located in Chapter 2 of this Business Continuity Plan. Additional information, including the contract and a map, can be found in Appendix D.*

**1.9 Emergency Operations Center (EOC) Locations/Contacts**

Many organizations have three designated EOC locations:

(1) a large conference room in the business office facility,

(2) a hotel that is relatively convenient for all team members, and

(3) the Alternate Site facility.

|  |  |  |  |
| --- | --- | --- | --- |
| # | EOC Location | EOC Point of Contact | POC Phone Number |
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**1.10 Alternate Site Locations and Contacts**

If you have a declared disaster, you will need to notify your Alternate Site and Offsite Storage locations. Remember that commercial vendors charge a declaration fee upon notification, even if you do not completely implement your Business Continuity Plan.

Alternate Site

|  |  |  |  |
| --- | --- | --- | --- |
| # | Site Location | Point of Contact | Contact Phone Number |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Offsite Storage

|  |  |  |  |
| --- | --- | --- | --- |
| # | Site Location | Point of Contact | Contact Phone Number |
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**1.11 Organizational Chart**

The ability to quickly access your company’s basic organization is essential during recovery after a disaster or catastrophic event. Each organization is unique so this space is left free for you to enter your unique organizational structure in as much or as little detail as desired.

**1.12 Team Descriptions and Organization Chart**

Members of your staff must be willing and committed to assist in response and recovery efforts. Not everyone in your organization will be willing or able to participate due to health issues, family obligations, or other important responsibilities. Select team members that are able and willing to commit to the task. Organizing and training your staff in advance will make them more effective, more confident, and more resilient should they have to respond to an actual event. Having an organized, trained recovery staff will make the process run smoothly and give everyone a sense of purpose. You may use some or all of these teams depending on the size and complexity of your organization. In small organizations, teams with similar functions may be combined or a team may consist of only one person.

Team Descriptions and Organizational Chart Cont.

**1.13 Emergency Response Plan Summary**

This template assumes that each organization using it already has an approved emergency response plan that is routinely reviewed, exercised, and updated. Please summarize key elements of that plan in this space. Suggested key elements to include here are procedures for notifying and working with emergency responders, guidelines for making a company disaster declaration, notifying staff and maintaining lines of communications, triggering implementation of the business continuity plan, how and when to move to an alternate site, how to access data stored off site, etc.

*\*Remember, although there is some overlap, a business continuity plan is primarily a recovery and mitigation plan while your Emergency Response Plan focuses primarily on preparedness and response.*

*\*Attach Emergency Response Plan Summary if applicable.*

**Chapter 2 - Critical Business Information**

This chapter contains the call lists, task lists, and various resource inventories that make it easier to execute the BCP, and improve ease of distribution and plan updating. Inventories include lists of Customers, Equipment, Software, Hardware, Supplies, Telecommunications, Vendors, and Vital Records that are required to support the BCP.

Based on the structure and identified responsibilities of your organization, you will have specific teams responsible for aspects of executing your BCP. Each team will have a series of lists (Call List, Task List, etc.) unique to its responsibilities. The Call List for each team is shown first so it is easy to find for emergency notifications. The Task List is shown next so that it is easy for the Team Leader to find it after the emergency notification. You select the teams that you will need and prepare the lists necessary for your business to complete its BCP (or enter your own team names into the table's blank fields).

Not all teams will use all the lists. For example, the Executive Management Team may not have any customers (Customer List) or vendors (Vendor List) because customers and vendors will usually be notified by other teams. If a team does not have one or more inventory lists, place a statement in that section as a “place holder” such as: “The Executive Management Team does not have a Customer List. The Customer List is maintained by Marketing Team.” This will remind each team leader that a Customer List does exist and should be updated if there is a change to the business or product lines. Lists should be reviewed and updated routinely as personnel responsibilities change, hardware or equipment is upgraded, or new product lines are introduced.

The templates included in this section are generic master templates and can be used and re-used for all teams. As you develop your lists for each team, fill out the templates and save them. When you need additional templates, simply create an additional copy of the list(s) you need. Some lists have suggested data entry information. This can be changed, omitted or amended as necessary. Add additional lines to these tables if you need them.

|  |  |
| --- | --- |
| # | Team Name |
| 1 | Business Continuity |
| 2 | Damage Assessment/Salvage |
| 3 | Executive Management  |
| 4 | Facilities/Security |
| 5 | Finance/Accounting |
| 6 | IT/Telecommunications |
| 7 | Logistics/Transportation |
| 8 | PR/Marketing/Communications |
| 9 | Human Resources |
| 10 |  |
| 11 |  |
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| 14 |  |

**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Executive Management Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Damage Assessment/Salvage Team Call List

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| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Logistics/Transportation Team Call List

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| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Business Continuity Coordinator Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

PR/Communications/Marketing Team Call List

|  |  |  |  |  |  |  |
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| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Facilities/Security Team Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

IT/Telecommunications Team Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Finance/Accounting Team Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.1 Team Call Lists**

A list of all team members and their phone numbers on a team for the business continuity plan.

Human Resources Team Call List

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Mobile Phone Number | Home Phone Number | Email | Work Unit/Department | Home Address |
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**2.2 Team Task List -** Executive Management Team

A list of all team members and their phone numbers on a team for the business continuity plan.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Damage Assessment/Salvage Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Logistics/Transportation Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Business Continuity Coordinator

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** PR/Communications/Marketing Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Facilities/Security Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** IT/Telecommunications Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Finance/Accounting Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**Team Task List -** Human Resources Team

A list of all team members and their phone numbers on a team for the business continuity plan.

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| # | Task | Assigned | Frequency | Method | Schedule |
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**2.3 Team Action Plan**

Response Team Action Plan

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| Business Continuity Response Teams |
| Executive Management Team | Business Continuity Coordinator | IT/Telecommunications Team |
| Damage assessment/ Salvage Teams | PR/Communications/Marketing Teams | Finance/Accounting Teams |
| Logistics/Transportation Teams | Faculties/Security Teams | Human Resources Teams |

*\*The following nine pages are encouraged to be printed multiple times to be used by all parts of the business continuity response teams.*

**Executive Management Teams**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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| # | Responsibilities |
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| # | Tasks (Primary Facility) |
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**Business Continuity Coordinator**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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| # | Responsibilities |
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**IT/Telecommunications Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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**Damage Assessment/Salvage Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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| # | Tasks (Alternate Sites) |
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**PR/Communications/Marketing Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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**Finance/Accounting Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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**Logistics/Transportations Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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**Facilities/Security Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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| # | Tasks (Primary Facility) |
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**Human Resources Team**

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| Name | Mobile Phone Number | Home Phone Number | Work Phone Number | Email | Home Address |
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| # | Tasks (Primary Facility) |
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| # | Tasks (Alternate Sites) |
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**2.4 Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Executive Management Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Damage Assessment/Salvage Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Logistics/Transportation Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Business Continuity Coordinator Customer List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**PR/Communications/Marketing Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Facilities/Security Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**IT/Telecommunications Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Finance/Accounting Team Customer List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**Team Customer List**

An inventory list of all primary customers - including name, address, telephone number, and contact – That must be notified during the recovery process.

**Human Resources Team Customer List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Customer Name | Phone Number | Contact Name | Email Address | Mailing address | Product |
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**2.5 Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Executive Management Team Mission Critical Equipment List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Executive Management Team Mission Critical Equipment List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Damage Assessment/Salvage Team Mission Critical Equipment List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Damage Assessment/Salvage Team Mission Critical Equipment List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Logistics/Transportation Team Mission Critical Equipment List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Logistics/Transportation Team Mission Critical Equipment List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Business Continuity Coordinator Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Business Continuity Coordinator Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**PR/Communications/Marketing Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**PR/Communications/Marketing Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Facilities/Security Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Facilities/Security Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**IT/Telecommunications Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**IT/Telecommunications Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Finance/Accounting Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Finance/Accounting Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Human Resources Team Mission Critical Equipment List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Mission Critical Equipment List**

List of items needed to complete duties in case of an emergency.

**Human Resources Team Mission Critical Equipment List**

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| # | Name | Source | Item Number | Cost/Item | Quantity | Total |
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**2.6 Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Executive Management Team Software List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Damage Assessment/Salvage Team Software List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Logistics/Transportation Team Software List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Business Continuity Coordinator Software List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**PR/Communications/Marketing Team Software List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Facilities/Security Team Software List**

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| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**IT/Telecommunications Team Software List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Finance/Accounting Team Software List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**Team Software List**

This list is for any software that is critical to Job functions used by each team.

**Human Resources Team Software List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Software Name | Version | Purpose | Point of Contact | Phone Number | Email |
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**2.7 Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Executive Management Team Supplies List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Damage Assessment/Salvage Team Supplies List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Logistics/Transportation Team Supplies List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Business Continuity Team Supplies List**

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| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**PR/Communications/Marketing Team Supplies List**

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| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Facilities/Security Team Supplies List**

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| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**IT/Telecommunications Team Supplies List**

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| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Finance/Accounting Team Supplies List**

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| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**Team Supplies list**

An inventory list of all supplies and associated vendors which are required for the recovery of a business or company. It is more than likely each team will have multiple pages for this sheet.

**Human Resources Team Supplies List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Item Name | Source | Item Number | Cost/Item | Quantity | Total |
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**2.8 Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Executive Management Team Telecommunications List**

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| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Damage Assessment/Salvage Team Telecommunications** **List**

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| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Logistics/Transportation Team Telecommunications List**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Business Continuity Coordinator Telecommunications List**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**PR/Communications/Marketing Team** **Telecommunications List**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Facilities/Security Team Telecommunications List**

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| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**IT/Telecommunications Team Telecommunications List**

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| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Finance/Accounting Team Telecommunications List**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**Team Telecommunications List**

An inventory list of all voice communications and data communications circuits which are required for the recovery of a business or company.

**Human Resources Team Telecommunications List**

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| # | Company Name | Account Number | Phone Number | Point of Contact | Email |
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**2.9 Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Executive Management Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Damage Assessment/Salvage Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Logistics/Transportation Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Business Continuity Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**PR/Communications/Marketing Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Facilities/Security Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**IT/Telecommunications Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Finance/Accounting Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**Team Vendor list**

An inventory list of all primary vendors - including name, address, phone number, and vendor representative – that provide and essential service or product required for the recovery of a business or company.

**Human Resources Team Vendor List**

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| # | Vendor Name | Phone Number | Email Address | Mailing Address | Product |
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**2.10 Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**Executive Management Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

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**Damage Assessment/Salvage Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Logistics/Transportation Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

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**Business Continuity Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**PR/Communications/Marketing Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**Facilities/Security Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**IT/Telecommunications Team Vital Records List**

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| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**Finance/Accounting Team Vital Records List**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Team Vital Records List**

An inventory list that contains the name and offsite location of vital records required for the recovery of a business or company. Different teams will need different sized lists. Replication of lists is encouraged. (Examples of record types include: Accounting/Records, Additional Documents, Buildings/Facilities, Contracts, Custom made Equipment, Data Processing Information, Employee/Customer/Supplier Databases, Engineering Plans/Drawings, Formulas/Trade secrets, Insurance Policies, Personal Files, Product List/Specifications, Products, Supporting Documents for Claims)

**Human Resources Team Vital Records List**

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| --- | --- | --- | --- | --- | --- | --- |
| # | Record Type | Record Name |  Steady State Location | Back Up(Yes or No) | Back Up Location | Point of Contact |
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**Chapter 3 - Plan Administration and Maintenance**

This section contains a variety of information related to administering and maintaining the BCP. It includes sections and subsections on administration, training, maintenance, awareness programs, education, auditing the BCP, and obtaining plan approvals.

The success of the Business Continuity Planning process is largely in the hands of the BCC. The BCC has overall responsibility for coordinating with the team leads to design, develop, coordinate, implement, and administer the training, awareness programs, and updating and maintenance of the Business Continuity Plan.

It is not practical for a large, geographically-separated organization to have one single individual who can effectively perform all the responsibilities listed in the previous section. Moreover, it is sometimes difficult in a smaller, single-site organization or company, especially if the BCC has other responsibilities beyond the BCP. Therefore, a more practical approach is to form a planning team with the BCC as the Planning Lead.

In a smaller organization, the Planning Team shares the responsibility for various sections of the BCP. Individual team members may be responsible for a portion of the BCP, such as a department or business unit. The Planning Team should consist of representatives from throughout the organization who can coordinate planning efforts within their department or business unit. Team members should have the support of management within their own business unit and be able organize and conduct department/business unit meetings as necessary to meet overall planning timelines.

**Business Continuity Planning Team List**

The most successful planning teams are limited in size, have a formal membership, regularly scheduled meetings, and members are designated in writing. This precludes sending a different representative to every meeting, constantly changing team size, etc.

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| # | Team Members | Office Phone | Mobile Phone | Email |
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**3.1 Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | Executive Management Team Responsibilities (Pre-Disaster) |
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| # | Executive Management Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | Damage assessment/Salvage Team Responsibilities (Pre-Disaster) |
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| # | Damage Assessment/Salvage Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

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| # | Logistics/Transportation Team Responsibilities (Pre-Disaster) |
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| # | Logistics/Transportation Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | Business Continuity Team Responsibilities (Pre-Disaster) |
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| # | Business Continuity Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | PR/Communications/Marketing Team Responsibilities (Pre-Disaster) |
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| # | PR/Communications/Marketing Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | Facilities/Security Team Responsibilities (Pre-Disaster) |
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| # | Facilities/Security Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

The following subsections describe each functional team’s role as well as its responsibilities in preparing for and responding to a disaster. This is the time to decide what each of the functional response teams is going to do as your business recovers from a disaster or catastrophic event. Brainstorming these responsibilities is a key role for the BCP Planning Team. Always keep in mind that the number and type of teams that you need in your plan depends entirely on the size and complexity of your business.

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| # | IT/Telecommunications Team Responsibilities (Pre-Disaster) |
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| # | IT/Telecommunications Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

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| # | Finance/Accounting Team Responsibilities (Pre-Disaster) |
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| # | Finance/Accounting Team Responsibilities (Post-Disaster) |
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**Functional Teams and Responsibilities**

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| # | Human Resources Team Responsibilities (Pre-Disaster) |
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| # | Human Resources Team Responsibilities (Post-Disaster) |
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**3.2 Business Continuity Plan Administration**

Administration of the BCP can be simple or complex depending on the size of the organization. Describe in general terms how you plan to conduct awareness and training activities. The following sections will provide more detailed information on your actual activities.

**3.3 BCP Awareness and Training**

This section contains basic information on how you administer the Awareness and Training Programs for your BCP. The following table provides some suggestions and allows you to schedule BCP Awareness training. Employee newsletters are a great tool to keep awareness high in between annual events. They are also the perfect venue to remind employees about seasonal hazards like severe winter storms, flooding, hurricanes, tornadoes, etc. Helping to keep your employees personally prepared and resilient will help the company be more resilient as well.

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| # | Awareness Activity | Frequency | Responsible Office | Required Materials | Comments |
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**BCP Awareness and Training Cont.**

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| # | Awareness Activity | Frequency | Responsible Office | Required Materials | Comments |
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**3.4 Exercising (Testing) the BCP**

The Business Continuity Coordination Team is responsible for conducting periodic exercises of the Business Continuity Plan. At least ­­­\_\_\_\_\_\_\_ exercises shall be conducted every year. Use the table below to enter your actual exercise information.

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| # | Exercise Type | Purpose | Participants | Dates |
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**Exercising (Testing) the BCP Cont.**

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| # | Exercise Type | Purpose | Participants | Dates |
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**3.5 Business Continuity Plan Maintenance**

Maintenance of your BCP is perhaps the most difficult step for most people to understand, primarily because people believe that after the BCP has been written, exercised, and updated, it’s just another project that has been completed. However, BCP maintenance is a cyclical process. Your BCP is a “living document.” It will continually grow and change.

Once you have completed the initial version of your BCP, you will test and exercise it to see if it works. After the test, you will conduct a “lessons learned” session to identify weaknesses and areas that need improvement. You will review the plan and add the improvements as well as any changes to personnel and hardware. Then you will test it again…Your BCP is never complete. People change, business needs grow and change, and business operations must accommodate those changes. Therefore, you need to have a provision documented to handle those changes.

The BCC is responsible for the maintenance of this document. When updates are required, the BCC shall establish a timetable for updates, ensure the required updates are completed, and distribute the updated plans to the Distribution List at the beginning of this document.

The plan is updated as needed:

* in response to major changes to the organization such as office moves, telephone number changes, new personnel, changes to BCP Teams, retirements, duty changes, new product lines, and additions or deletions of critical applications or manufacturing processes;
* in response to changes in business processes revealed during updates to the Business Impact Analysis;
* after each alternate site test to reflect the recommendations resulting from the post-test wrap-up debriefings; and
* based on exercise lessons learned and annual plan reviews.

As sections of the plan are updated, the revised sections are provided to BCP team members and any additional plan holders. All BCP participants and plan holders are notified of the changes and encouraged to review all changes and appropriately update their copy of the plan. Updates will generally be distributed electronically and plan holders will print hard copies to insert in their plans.

In addition, the plan will be updated in the event an actual disaster occurs. The plan will be reviewed and updated at a convenient point after the initial responses to the disaster have been completed.

A revision history will be included in this section as a part of all updates to the BCP.

The Business Impact Analysis (BIA) is not a one-time project. It is also a “living document” because of business changes and growth as stated in the previous section. As a result, the BIA requires maintenance whenever a major business change occurs or at least once a year, whichever comes first. BIA updates should be scheduled during off-peak times of the year to ensure that key managers have the necessary time to review and update the tool.

The BCC is responsible for the maintenance and update of the Business Impact Analysis. When updates are required, the BCC shall establish a timetable for updates, ensure the required updates are completed and generate BCP updates if required based on the new data collected.

A BIA update is needed annually and/or:

* in response to events such as major shifts in markets, manufactured products, manufacturing processes, or plant location;
* as directed by senior management;
* when major deficiencies are identified through exercise lessons learned and annual plan reviews; and
* when full functionality is restored after a major disaster or catastrophic event.

The BCP will be updated to reflect changes in the BIA.

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| # | Revision History (Date) | Summary of Changes |
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**3.6 Business Continuity Plan Approvals**

Regardless of how you develop your BCP, one of the last, but very important steps, is to make certain you have a formal sign-off by senior management on your initial plan. You should also obtain approval every time you change or update the plan.

Plan Approval:

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| Revision Date | Signature, Title | Date Approved |
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**Chapter 4 - Exercise Plans and After-Action Reports**

This section contains information on the several types and frequency of plan testing.

It is important to remember that the purpose of an exercise is to find the weaknesses in your plan and correct them. In this sense, an exercise is never a failure unless it fails to test your plan or fails to create a valid situation in which your plan can be examined. An exercise is NOT a report card on how well the planning team did its job.

This Business Continuity Planning Suite contains a Business Continuity Plan Test, a tool developed for testing and exercising your newly created BCP.

The overarching objectives of a BCP exercise program are to:

* Create a learning environment for all participants to learn about the BCP
* Document changes and updates (including omissions) to the BCP

**4.1 Business Continuity Plan Exercise Methodology**

The Business Continuity Plan can be verified and validated using any one of the following methodologies:

* Tabletop Exercise - key personnel discussing simulated scenarios in an informal setting.
* Functional Exercise - simulates the reality of operations in a functional area by presenting complex and realistic problems.
* Full Scale Exercise - real operations in multiple functional areas present complex and realistic problems that require critical thinking, rapid problem solving, and effective responses by trained personnel.
* Drill - coordinated, supervised activity usually used to test a single specific operation or function.

When to Exercise the Business Continuity Plan:

It is a best practice to have a minimum of two Business Continuity Plan exercises every year: one Tabletop Exercise, and one Functional Exercise or Drill that includes the technical aspects of your plan and user participation.

A Full-Scale Exercise may be planned in conjunction with a community disaster exercise as the plan matures.

**4.2 Exercise Objectives**

The overarching objectives of a Business Continuity Plan Exercise are to:

* Determine the state of readiness of your BCP by creating a learning environment for all participants to learn about the plan.
* Validate the BCP resource lists -- people and inventories are sufficient to effect recovery of business operations and/or IT services as appropriate. Document changes and updates (including omissions) to the BCP.
* Verify the information in the BCP is current and accurately reflects the organization’s requirements.

Exercise objectives should adhere to the "SMART" model. They should be:

* **Specific**: Be precise about what you want to achieve.
* **Measurable**: Quantify your objectives.
* **Achievable**: Are you attempting too much?
* **Realistic**: Do you have the resources necessary to accomplish the objective (people, money, material, equipment, etc.)?
* **Time bound**: Have you allowed a reasonable timeframe in which the objective can be accomplished?

The plan is updated as needed:

* In response to major changes to the organization such as office moves, telephone number changes, new personnel, changes in BCP Teams, retirements, duty changes, new product lines, and additions or deletions of critical applications or manufacturing processes;
* In response to changes in business processes revealed during updates to the Business Impact Analysis;
* After each alternate site test to reflect the recommendations resulting from the post-test wrap-up debriefings; and
* Based on exercise lessons learned and annual plan reviews.

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| # | BCP Team | Objective |
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**4.2 Exercise Objectives**

 After the exercise, make certain that all changes and updates are completed, and distribute those updates to your Distribution List as described in Chapter One.

If your organization has an alternate site, include this facility in your exercise plans to verify its technical aspects and resources. It is helpful to have a separate exercise for your Information Technology systems recovery because business users only care whether their computer systems are available, not the technical details of how IT does it.

The first time you exercise the technical aspects of your plan, including denial of user access to computer systems, it is recommended that it be limited to IT staff only. It is not unusual for issues to be identified during a technically focused exercise that cause problems during the recovery of systems and backup data. Missing tapes or media (e.g., install CDs), corrupted/unreadable media, telecommunications failures of all kinds, incompatible hardware, and various other hardware failures can contribute to a “less successful” exercise for general participants. If this occurs during your first functional exercise, it is important to remember the objectives are identical to those stated above for the tabletop exercise, especially considering that this exercise is intended to identify problems (and their corrective actions) and provide training.

When your IT staff has completed a technically focused exercise that accomplished all objectives for your IT systems availability, then you need to have an alternate exercise that includes both IT recovery and testers to validate that all restored systems and data are accurate, operational, and synchronized. Testers can be a combination of IT staff and users.

**4.2 Exercise Objectives**

The following checklist will assist you in planning table top exercise events. These are general timelines that you may need to adjust for your specific exercise.

To ensure a successful Full Scale Test, the Full-Scale Tests Team will:

90 Days Prior

* Determine resource needs and identify constraints (room sizes available, etc.) in coordination with other participants (e.g., key suppliers, customers, local emergency responders) based on estimated attendees.

60 to 45 Days Prior

* Identify and distribute invitations to facilitators, scribes, and other support personnel required in consultation with other participants (e.g., key suppliers, customers, local emergency responders).
* Establish a registration cut-off date for any outside invitees, like customers, vendor support, call center representatives, or emergency responders.
* Distribute invitations and registration questionnaires to participants and observers via letter or email. Display posters, if applicable.
* Complete follow-up phone calls to prospective attendees if resources are still available.

30 to 10 Days Prior

* Schedule facilitator training (if required).
* Determine the most effective way to categorize attendees (e.g., grouping participants based on similar Department, BCP responsibilities).
* Finalize PowerPoint™ presentation and exercise documentation.
* Confirm facilitators, scribes, and other support personnel attendance and responsibilities.

10 Days Prior to Exercise Start

* Confirm registrant attendance through emails or phone calls.
* Create name tags.
* Conduct dry run.

Post-Exercise

* Conduct Exercise Hot Wash/plenary session.
* Collect and analyze scribe data collection forms and produce an After-Action Report.
* Formulate lessons learned and next steps to address areas of improvement identified during the exercise.

**4.3 Developing the Exercise Scenario**

Regardless of which methodology is chosen to exercise your BCP, a scenario must be developed for the exercise. Consider the following as you develop your Exercise Scenario and/or Plan:

* Focus on teams which have had deficiencies in the past. For example, verify that the BCP has been updated to reflect resource requirements and any technical issues.
* Ensure that the exercise involves only the use of offsite resources to verify the accuracy and completeness of Offsite Storage, including Vital Records.
* Choose a realistic scenario as discussed in the following paragraphs.

Create your exercise objectives first, and then create a short scenario that describes a situation where your location has suffered an obvious disaster, such as a fire, flood, or tornado that will enable you to meet your objectives. Provide explicit details, such as describing the damage status of the facility, production, and data center after the event.

For any exercise involving a commercial alternative site, be sure to decide with the vendor first. You may find you will need to schedule exercises as much as a year in advance, depending on the vendor’s schedule, so you will need to plan with an Exercise Plan. Then you can create your exercise objectives and scenario as discussed above.

**4.4 Exercise Evaluation**

You should always document the evaluation of the exercise and include it as part of your BCP. If you have developed your exercise scenario and plan as discussed in the previous section, you have already completed part of the documentation. Your After-Action Report (AAR) should be provided to senior management, (i.e., the Executive Management Team) with a copy to all exercise participants. You should utilize the Distribution List discussed in Chapter One for this purpose.

The AAR documents what occurred in the exercise and the basics of the planning process. The following table provides the basic information that an AAR should contain.

|  |  |
| --- | --- |
| Topic | Discussion |
| Executive Summery |  |
| Purpose |  |
| Concept |  |
| Objectives |  |
| Evaluations Methodology | Data Collection | Analysis and Evaluation |
|  |  |
| Activity Summary |  |
| Outcomes |  |
| Recommended Actions & Next Steps |  |
| Lists of Participants and contact information | Name | Phone Number | Email |
|  |  |  |

**4.5 Exercise Reports**

Provided below is a table to record the date and type of exercise or drill conducted. The bi-yearly exercises of the BCP should be scheduled approximately six months apart.

The next scheduled exercises are:

* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The following table tracks the dates of previous exercises for the indicated plan elements:

|  |  |  |  |
| --- | --- | --- | --- |
| # | Date | Exercise Type | Plan Area Exercised |
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1. Recovery Time Objective: Period in which systems, applications, or functions must be recovered after and outage (ex. One business day). RTO’s are often used as the basis for development for recovery strategies and as a determinant as to whether to implement recovery strategies during a disaster situation. [↑](#footnote-ref-1)