

THE SCOOP ON COOP:
A Workbook for Human Services
Continuity of Operations Planning
& Disaster Recovery

Health & Human Services
Disaster Recovery Leadership Network
Pinellas County
July 2007

THE SCOOP ON COOP: A Workbook for Human Services Continuity of Operations Planning & Disaster Recovery
Version 1.0, May 2007 Version 2.0, July 2007

Links to *THE SCOOP ON COOP: A Workbook for Human Services Continuity of Operations Planning & Disaster Recovery* are available at: www.hhscc-pinellas.org, www.jwbpinellas.org, and www.unitedwaytampabay.com. For more information contact:

Health & Human Services Disaster Recovery Leadership Network
501 1st Avenue North, Suite 500
St. Petersburg, FL 33701
727-582-7953

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FOREWORD

The Health & Human Services Disaster Recovery Leadership Network (DRLN) resulted from a study funded by the Juvenile Welfare Board (JWB) and the United Way of Tampa Bay (UWTB). Established in early 2006, members of the DRLN include representatives from the Area Agency on Aging, Florida Department of Children & Families, Health & Human Services Coordinating Council, Juvenile Welfare Board of Pinellas County, Pinellas County Government, Pinellas County Health Department, School Board of Pinellas County, and United Way of Tampa Bay. The DRLN promotes inter-agency and inter-governmental collaboration and does not duplicate County or Federal efforts. The DRLN provides services after a disaster has occurred when it is safe to do so. It does not provide services prior to or during a disaster nor does it provide emergency shelter.

In May 2006, the DRLN convened and proceeded to develop a system for ensuring that priority human services are made available to the local community at the earliest time possible after a disaster such as a

hurricane. That system is described in the *Health & Human Services Disaster Recovery Leadership Network Operations Manual* (2006). The Manual is envisioned as a “living document” that will continue to be improved upon as new information and experience indicates.

In April 2007, the DRLN (through a contract with JWB and UWTB) retained the services of Linda Kraus to develop *THE SCOOP ON COOP: A Workbook for Human Services Continuity of Operations Planning & Disaster Recovery*. The purpose of the *Workbook* is to provide information and suggestions to human services agencies in Pinellas County as they work through the COOP process. The strategies and advice described in this guide are recommendations, not regulations or requirements. The author and the Health & Human Services Disaster Recovery Leadership Network disclaim all warranties and guarantees with respect to the information in this document and assume no liability or responsibility with respect to the information.

The mission of the Health & Human Services Disaster Recovery Leadership Network is to ensure that priority human services are made available to the public at the earliest opportunity should a major disaster occur in Pinellas County.

THE SCOOP ON COOP:

A Workbook for Human Services

Continuity of Operations Planning & Disaster Recovery

In the wake of a major natural disaster such as a hurricane or flood, human service agencies already in the business of providing shelter, food, medical care and other essential needs will be immediately required to mobilize and provide mass care – this at a time when the agencies' own facilities may be uninhabitable for months and its personnel counted among evacuees and victims. Fire, the most common hazard, won't impact a community on the same scale, but it can still wreak havoc on daily operations and the provision of services. Considerable advance planning and preparation are therefore needed to ensure that agencies are able to continue providing essential functions and priority services at the earliest opportunity and in a coordinated, efficient manner.

The purpose of *THE SCOOP ON COOP: A Workbook for Human Services Continuity of Operations Planning & Disaster Recovery* is to aid local agencies in just such a process. **A Continuity of Operations Plan (COOP) is a**

set of procedures and preparations to take before, during and after a disaster to ensure that an agency's essential functions are maintained. While the primary concern for Pinellas County, a peninsula on the west coast of central Florida, is for hurricanes, tornados and flooding, much of a local agency's preparations may be applied to other types of natural disasters or emergency situations that require the relocation of programs and services for extended period of time.

Ultimately, a COOP is a post-disaster “how-to” plan—how to preserve an organization's structure, how to continue providing essential services, and how to maintain funding in the wake of a disaster. The key question to address in planning a COOP is:

What can we do now to ensure that normal operations will be resumed in the shortest time possible after a disaster has occurred?

Answering this question requires your agency to establish its most critical mission functions and to

anticipate the vital records, data, personnel, equipment and other resources that will be needed in the activation of a COOP.

Developing a COOP requires forethought, flexibility, and more than a little fearlessness. It means spending considerable time, effort and possibly some money anticipating worst-possible scenarios. It means preparing, even practicing, for a major disaster's impact on every aspect of business, community, and life as we typically know it. It means recognizing that some of your organization's most severe losses will occur after the initial catastrophe and disruption of services; this may include subsequent loss of funding, employee attrition and damage to the agency's reputation. A detailed yet

adaptable plan to continue operations after a major disaster can significantly enhance your agency's ability to resume providing needed services and to quickly return to its pre-disaster state.

Protecting our community's most valuable assets means protecting your agency from disaster or disruption of services.

GETTING STARTED

Your agency wasn't built in a day and neither will your continuity of operations plan. It will take weeks or maybe months to draft, revise, practice, and put into place. And because your agency will change, a COOP is a "living document" that will require regular reviews and updates.

The objective of *The SCOOP ON COOP Workbook* is to make the planning and preparation process as simple as possible. Presented here is a step-by-step approach to creating and maintaining a comprehensive emergency management plan. Additional resources (with active links to websites) accompany each step. The advice, worksheets and checklists have been compiled from COOPs developed by a variety of agencies.¹ They have been adapted or customized specifically to help Pinellas County human service agencies through the process of COOP planning and disaster recovery.

However, when it comes to a COOP, one size does not fit all. Each agency is unique and its COOP must be tailored to fit. The worksheets and checklists provided here are templates that should be re-worked, expanded or otherwise adapted to fit the specific needs and circumstances of your particular agency. The strategies and advice described in this guide are recommendations, not regulations or requirements.

¹ The list of references used is provided at the end of *The SCOOP ON COOP Workbook*.

If your agency provides a wide range of services, consider developing COOPs for each department or program. One person should review all the COOPs for consistency. Others who might be of help during the COOP development process are an accountant or financial planner, attorney, human services contractor, payroll vendor, and building inspector. In addition, companies that develop COOPs as their business could serve as consultants or advisors.

There are many steps in the development of an effective COOP, and a **Master Task List** is provided at the end of *The SCOOP ON COOP Workbook*. However, there are five critical tasks that must be accomplished above all. As you begin your planning process, keep these tasks uppermost in your mind.

THE Mini-COOPer: 5 COOP TASKS YOU ABSOLUTELY MUST DO

1. **Prioritize Essential Functions**
2. **Review Insurance Coverage**
3. **Develop a Communications Plan**
4. **Protect Vital Records & Databases**
5. **Conduct an Inventory**

ADDITIONAL RESOURCES FOR GETTING STARTED

For additional COOP Templates & Planning Guides

- ★ *COOP for Smaller Community-Based Organizations Toolkit*, Volunteer Florida, www.volunteerflorida.org.
- ★ *Open for Business: A Disaster Planning Toolkit for the Small to Midsized Business Owner*, Institute for Business & Home Safety, www.ibhs.org/docs/openforbusiness.pdf.
- ★ *Emergency Management Guide for Business & Industry: A Step-by-Step Approach to Emergency Planning, Response & Recovery for Companies of All Sizes*, Federal Emergency Management Agency, www.fema.gov/business/guide/index.shtm.

For a comprehensive on-line library of disaster preparedness and planning articles and checklists

- ★ American Red Cross, <http://redcross.tallytown.com/educate.html#004>.

For an example of COOP by a local human service agency

- ★ *Continuity of Operations Plan*, Pinellas County Health Dept., www.pinellashealth.com/PHP/Plans/PinCHDCOOP.pdf.

Business Continuity Planning Organizations with links to other resources

- ★ Association of Contingency Planners, www.acp-international.com.
- ★ Disaster Recovery Institute International, www.drii.org.
- ★ Global Partnership for Preparedness, www.globalpreparedness.org.
- ★ The Business Continuity Institute, www.thebci.org.

TASK: FORM TEAMS

Depending on the size of your agency's staff and facilities and its range of operations, at least three types of disaster teams may be needed: a **COOP Team**, a **Relocation Team**, and a **Recovery Team**. It may be useful to subdivide each team into **Logistical** and **Administrative** sub-teams. Outlined in the following **Team Mission & Tasks** are some of the main duties of each team. Even if your agency is small, however, and all the planning and recovery tasks are being addressed by just one or two people, it will be useful for planning purposes to think in terms of these teams and their responsibilities.

In addition, your agency may want to form a **Disaster Volunteer Coordination Team** to plan for and process the hundreds or possibly thousands of volunteers who will come to offer help in the event of a major disaster. This topic is covered under "Manage Spontaneous Volunteers."

All teams should include a broad cross-section of personnel from each level and each department or program. To demonstrate the agency's commitment to continuity of operations and the collaboration that is required, team members and alternates should be appointed in writing by upper management with their team assignment reflected in their job descriptions. In addition, each team should work with the agency's leaders to develop:

- ❑ A mission statement which defines the teams' objectives as well as the authority and structure of the teams.
- ❑ A work schedule and timetable.
- ❑ A budget for necessary expenses, e.g., printing, training, disaster supplies and equipment (generator, satellite phones), increasing insurance coverage.

At least one person on the Relocation Team should be trained in CPR and first aid.

Additional Resources

- ★ For first aid training conducted locally: American Red Cross, www.redcrossbc.org/get-training.html.
- ★ For planning considerations for specific emergencies & disasters: *Emergency Management Guide for Business & Industry*, FEMA, pgs. 49-65, www.fema.gov/business/guide/index.shtm.
- ★ For estimated costs of disaster supplies: *Open for Business: A Disaster Planning Toolkit for the Small to Midsized Business Owner*, Institute for Business & Home Safety, pg. 44, www.ibhs.org/docs/openforbusiness.pdf.

TEAM MISSIONS & TASKS

COOP TEAM	RELOCATION TEAM	RECOVERY TEAM
MISSION	MISSION	MISSION
To develop, coordinate and update plans and activities required for performing essential functions in the event of a disaster.	To prepare personnel and equipment to continue operations at an alternate facility.	To prepare for resuming normal operations at primary facility.
ADMINISTRATIVE TASKS	ADMINISTRATIVE TASKS	ADMINISTRATIVE TASKS
<ul style="list-style-type: none"> <input type="checkbox"/> Identify and take steps to ensure continuation of critical functions. <input type="checkbox"/> Pre-arrange alternate procedures for purchasing and payroll. <input type="checkbox"/> Prepare messages for suppliers, customers, partner organizations, media. <input type="checkbox"/> Document trainings, drills and COOP updates. 	<ul style="list-style-type: none"> <input type="checkbox"/> Maintain detailed, accurate records to meet legal, insurance, financial and other requirements. <input type="checkbox"/> Maintain communication with employees, suppliers, customers, partner organizations, media. <input type="checkbox"/> Set up a "Reception & Processing Center" for employees and customers. 	<ul style="list-style-type: none"> <input type="checkbox"/> Establish priorities for resuming operations. <input type="checkbox"/> Notify employees, suppliers, customers, partner organizations, media. <input type="checkbox"/> Track all damage-related costs through receipts and photos or video.
LOGISTICAL TASKS	LOGISTICAL TASKS	LOGISTICAL TASKS
<ul style="list-style-type: none"> <input type="checkbox"/> Inventory existing equipment, vehicles, office supplies and other resources. <input type="checkbox"/> Identify and acquire needed equipment, supplies and other resources. <input type="checkbox"/> Stockpile disaster supplies. 	<ul style="list-style-type: none"> <input type="checkbox"/> Transfer vital documents and databases. <input type="checkbox"/> Transfer and maintain equipment, supplies, other resources. <input type="checkbox"/> Establish communications capability and network access. <input type="checkbox"/> Provide for personnel support, including food, lodging and transportation. 	<ul style="list-style-type: none"> <input type="checkbox"/> Salvage/protect undamaged property. <input type="checkbox"/> Restore/monitor repairs to damaged facility and equipment. <input type="checkbox"/> Maintain security at damaged facility. <input type="checkbox"/> Transfer vital documents, databases, & communication capabilities.

ROLE OF OTHER AGENCY PERSONNEL IN PLANNING, RELOCATION & RECOVERY	
* Provide input on executing essential functions.	* Participate in training and drills.
* Assist in identifying and backing up vital records.	* Provide emergency contact info to employer.
* Be prepared to support emergency relocation.	* Prepare own families for emergency.

TASK: ANALYZE VULNERABILITIES

Vulnerability refers to the potential impact of a disaster or incident on *all* aspects of an organization: staff, customers, equipment, supplies, resources as well as the ability to maintain essential functions. Vulnerability is frequently divided into three categories:

- ❑ **Impact on Humans** refers to your employees, volunteers and customers as well as to your agency's reputation in the community.
- ❑ **Impact on Property** includes facilities, equipment, supplies, stock, product and such intangibles as customer lists, databases and vital documents.
- ❑ **Impact on Agency Operations** concerns the likelihood of essential functions being restored if employees are unable to report to work, if basic utilities are unavailable, or if critical supplies cannot be delivered.

A **Vulnerability Analysis** is an assessment of the agency's resources and its ability to respond to each type of threat. It is the strength of resources – or more accurately, the lack of strength – that will enable the COOP Team to establish priorities and develop a plan of action. If, for example, the Vulnerability Analysis reveals that the entire phone system is dependent upon electricity, what steps need to be taken and what equipment bought in order to continue communication with staff and the community after a hurricane?

Each program or department in the agency should complete its own ***Vulnerability Analysis Worksheet***. In

addition, if you have more than one facility, rate each separately. Use the ***Considerations for a Vulnerability Analysis*** to evaluate a threat's impact and the strength of your agency's resources, particularly as to how a threat might affect your essential functions.

The types of threats listed on the *Vulnerability Analysis Worksheet* are not comprehensive and there might be hazards or risks unique to your agency or location that will require special planning. If there are hazards for which you do not know how to prepare, the local emergency management agency can refer you to a person, agency or department with the needed expertise.

Your agency's most vulnerable areas will be those that require the most planning.

Additional Resources

- ★ To determine evacuation level & nearest shelters: http://pubgis.co.pinellas.fl.us/hurricane_txt/.
- ★ For advice on hardening your facility: www.flash.org.
- ★ For tips on hurricane preparedness: Pinellas County Emergency Management, www.pinellascounty.org/emergency/Local.htm.

CONSIDERATIONS FOR A VULNERABILITY ANALYSIS

LOCATION	FINANCES	COMMUNICATIONS
<ul style="list-style-type: none"> ▪ What evacuation zone is this? ▪ Is there good access to major roads and bridges? ▪ Is there good access to public transportation? ▪ How close is the location to our target population? 	<ul style="list-style-type: none"> ▪ How fluid is our cash flow? ▪ What is our cash reserve, i.e., how many months could we go without an influx of funds? ▪ Are there sponsors or funders we could rely on in an emergency? ▪ Do we have enough insurance coverage? 	<ul style="list-style-type: none"> ▪ How many phones are not dependent on electricity? How many are networked or can roll to non-affected areas? ▪ What kinds of communication equipment do we have, e.g., cells, satellite phones, pagers, walkie-talkies, radios, fax machines, etc.?
FACILITY	DAILY RESOURCES	DISASTER RESOURCES
<ul style="list-style-type: none"> ▪ What is the condition of the building? ▪ Are roof and windows up to code? ▪ Is there a windowless place to go to in case of a tornado or high winds? ▪ Are there smoke alarms, fire extinguishers, or sprinkler systems? ▪ How many staff or volunteers are trained in basic fire fighting? ▪ Are evacuation routes and exits posted and visible during a power outage? ▪ Do we have enough space shelter staff as well as their families? To house staff from other agencies? 	<ul style="list-style-type: none"> ▪ How many vehicles do we have? How many are vans or trucks? ▪ How much computer equipment per staff member? How up-to-date is it? ▪ What is our status with regard to office furniture and supplies? ▪ Is there enough of a surplus of daily resources to help out other agencies? 	<ul style="list-style-type: none"> ▪ What is our status with regard to disaster supplies? ▪ How many generators and what kind? ▪ How many of our vehicles have 4-wheel drive? ▪ Is there enough of a surplus to help out other agencies? ▪ What is our ability to mobilize resources through other local, state or national agencies? ▪ How many staff or volunteers are trained in first aid or CPR?

VULNERABILITY ANALYSIS WORKSHEET

Use the **Degree of Impact** and **Strength of Resources Scales** below to assign scores to each column. Your agency's most vulnerable areas – and those that require the most planning – will be those with the highest totals.

DEGREE OF IMPACT SCALE	STRENGTH OF RESOURCES SCALE
1 = Minor; major agency operations not affected.	1 = Very Strong; easily available in & outside disaster area.
2 = Minimal; operations unavailable for some time; costs are incurred; public/customer confidence minimally affected.	2 = Strong; minimal difficulty/delay in finding or obtaining resources.
3 = Significant loss of operations & public relations/customer confidence.	3 = Moderate; somewhat difficult to find or obtain especially inside disaster area.
4 = Disastrous; operations down for extended period of time; systems need to be rebuilt, data replaced.	4 = Weak; difficult to find or obtain resources in & outside disaster area.
5 = Catastrophic; critical systems offline for extended period; data lost or irreparably corrupted; public health and safety affected.	5 = Very Weak; very difficult to find or obtain resources in & outside disaster area.

TYPE OF THREAT	IMPACT on HUMANS	IMPACT on PROPERTY	IMPACT on OPERATIONS	STRENGTH OF INTERNAL RESOURCES	STRENGTH OF EXTERNAL RESOURCES	TOTAL (Impacts plus Strengths)
Hurricane						
Tornado						
Flood or storm surge						
Fire						
Hazardous materials incident						
Technological incident, e.g., cyber attack, system shutdown						
Electrical storm						
Prolonged disruption of electricity/AC, other utilities						
Disease epidemic						
Terrorism						
Violence in the workplace						

TASK: PRIORITIZE ESSENTIAL FUNCTIONS

Essential Functions are those programs or services that are vital to your agency's mission and must be resumed as soon as possible. Each program or department in the agency should complete its own **Essential Functions Worksheet** which can then be reviewed by the COOP Team as they work to prioritize the mission-essential functions to be restored in the wake of a disaster. The **Customer Needs Worksheet** is useful for establishing which types of services are most essential for which types of customers.

In prioritizing essential functions, consider:

- If a particular function were not performed within three days after a disaster, what would be the impact on revenue, legal or contractual obligations, customer satisfaction, human lives, jobs, agency's reputation, and the chain of supplies/service to the community? What would be the impact if this function were not performed within two weeks? Thirty days?
- Following a disaster, will the demand or need for this function likely increase, decrease, remain the same, or terminate?
- After a disaster, will trained personnel, vital records, databases, supplies, equipment and systems will be available so that the function can be restored?
- What will be needed to sustain the essential functions for up to one month?
- Can peripheral services be modified or staff moved to provide a more essential service? Would suspension

of peripheral services enable the agency to provide essential services to a larger or more diverse population?

Prepare evacuation "Grab & Go Kits" for each essential function. These kits are comprised of the documents and equipment necessary for each function to be accomplished. Clearly identify those items that are vital and to be protected or removed in an emergency. For example, red stickers could indicate items that are the most critical and should be grabbed in an immediate evacuation (one minute's notice), while items with yellow stickers should be grabbed if you have 15 minutes notice.

ESSENTIAL ARE . . .

- * Food
- * Water
- * Crisis Counseling
- * Information
- * Shelter
- * Medical Attention

NOT ESSENTIAL ARE . . .

the egos of the staff whose programs were identified as non-essential.

Additional Resources

- ★ To determine critical services and functions: *Emergency Preparedness & Business Continuity Plan Template*, Nonprofit Leadership Center of Tampa Bay, pages 7-8, www.nlctb.org.

CUSTOMER NEEDS WORKSHEET

Example

CUSTOMER NEEDS / PROGRAM SERVICES				
TYPE OF CUSTOMER	FOOD	CLOTHING & SHELTER	MEDICAL SERVICES	INFORMATION
Children	Essential	Essential		
Disabled	Essential		Essential	
Homeless		Essential		Essential
Non-English Speaking				Essential

CUSTOMER NEEDS / PROGRAM SERVICES				
TYPE OF CUSTOMER				

ESSENTIAL FUNCTIONS WORKSHEET

MISSION STATEMENT:

RESTORE WITHIN 24 HOURS			
Priority	Essential Function	Resources Required (human, equipment, data, supplies, vendors)	Name, Phone, Position of Responsible Staff
1			
2			
3			
4			

RESTORE WITHIN 1 WEEK			
Priority	Essential Function	Resources Required (human, equipment, data, supplies, vendors)	Name, Phone, Position of Responsible Staff
5			
6			
7			
8			

RESTORE WITHIN 1 MONTH			
Priority	Essential Function	Resources Required (human, equipment, data, supplies, vendors)	Name, Phone, Position of Responsible Staff
9			
10			
11			
12			

TASK: REVIEW INSURANCE COVERAGE

Most human service agencies spend their funding on direct assistance and little, if any, on insurance coverage. Therefore when disaster strikes, they have little money available to repair own damaged facilities, continue paying employees, or maintain services to customers.

After conducting the Vulnerability Analysis, use the ***Insurance Coverage Worksheet*** to take stock of what insurance your agency has and what might be needed. Florida agencies should be aware that flood damage is not typically included in property insurance policies; a separate policy must be underwritten to cover floods. A separate policy is also required for damage or loss due to terrorist acts, something that had typically been covered under property insurance until the terrorist acts of September 11, 2001.

Work with your accountant and insurance agent to determine insurance coverage and needs. Ask:

- What are the policy deductibles and limits?
- What is the difference in cost between Actual Cash Value and Replacement Value coverage?
- What will it cost to repair or replace equipment and the primary facility?
- What are the costs and benefits of relocating to an alternate facility vs. a temporary suspension of operations?
- What kind of documentation is needed for claims?

Continuation of payroll in the event of a disaster will be an extremely important issue to employees and one that should be clearly described in the Employees' Handbook. To continue payroll as well as provide for repairs, agencies should strongly consider "Business Interruption & Extra Expense Insurance" by asking:

- What is the agency's cash reserve?
- How many payroll periods can be met without income?
- Will funds be available for overtime pay for the Relocation Team and other deployed staff?
- How long will it be before loss of income affects the delivery of services?
- How many vendors will get paid and which ones?

Photograph or videotape your facility and equipment for insurance verification purposes. Store the photographs or tapes in a safe off-site location.

Additional Resources

- ★ For information on National Flood Insurance Program: www.floodsmart.gov.
- ★ For information and assistance with business insurance and disaster preparedness, Florida Dept. of Financial Services: 1-800-342-2762 or www.myfloridacfo.com.

INSURANCE COVERAGE WORKSHEET

Insurance Coverage Review: _____ 2004 _____ 2005 _____ 2006 _____ 2007 _____ 2008

TYPE OF INSURANCE	COMPANY/ UNDERWRITER	POLICY NUMBER	DEDUCTIBLE	LIMITS ON COVERAGE

Record all insurance companies' contact information on separate *Key Contact Worksheets*.

TASK: ESTABLISH A CHAIN OF COMMAND

A formal chain of command may well already be in place to support your agency's everyday operations. It may however be limited to common situations such as illness in which a single high-ranking person is unavailable, debilitated or incapable of performing his/her authorized role and responsibilities for a period of time. The chain of command for a major disaster—when many or perhaps most of upper management may be unavailable—might need to be entirely different. Of particular importance in the wake of a major disaster will be who is authorized to make fiscal and personnel decisions.

Each agency should identify lines of succession and delegated authority for agency heads and other key leaders. Formal documents should be prepared which delineate the order(s) of succession and specify for each position or title:

- ❑ The authority that is being delegated, including any exceptions.
- ❑ Limits on authority including time in position, fiscal (e.g., maximum spending limit), and successor's authority to re-delegate assigned functions and activities.
- ❑ Conditions for succession, i.e., circumstances under which temporary authority would be exercised.
- ❑ Conditions for termination, i.e., circumstances under which normal authority would be resumed.
- ❑ Method of notification.

In addition to a clearly delineated chain of command, rosters of trained personnel with the authority to perform essential functions should be maintained and regularly updated.

IN THE EVENT OF A MAJOR DISASTER, WHO IS AUTHORIZED TO:

1. **Activate the COOP?**
2. **Make fiscal decisions, transfer money, and sign checks?**
3. **Make personnel decisions such as hiring and firing?**
4. **Speak to the media? Remind personnel and volunteers to refer all media to the spokesperson.**

Additional Resources

- ★ For suggestions on establishing a chain of command for emergencies: *Emergency Management Guide for Business & Industry: A Step-By-Step Approach to Emergency Planning, Response & Recovery for Companies of All Sizes*, FEMA, pgs. 27-29, www.fema.gov/business/guide/index.shtm.

TASK: PARTNER FOR PREPAREDNESS

Collaborative efforts with other organizations can be an effective way to conserve resources and advance your organization's missions. A **Mutual Aid Agreement** (or memorandum of understanding) is a written agreement between agencies and/or jurisdictions specifying how they will assist one another if requested. Consider agreements with other agencies to provide personnel, emergency power, shelter or storage space, medical support, emergency supplies, communication or computer equipment, services, transportation, even payroll. Be aware that obstacles to collaboration may arise, particularly around confidentiality issues and funding requirements or limitations.

A Mutual Aid Agreement should include:

- ❑ The parties' names, types of organization, city and state of headquarters.
- ❑ Overall objective/goal that reflects what the parties intend to do.
- ❑ A start and end date to the partnership, or in case of emergency activation of partnership, the title/position or name of individuals authorized to activate the Mutual Aid Agreement.
- ❑ Descriptions of each organization's responsibilities, beginning with those that are the sole responsibility of each agency followed by any shared responsibilities.

- ❑ Disclaimers concerning the employees' relationship to each partner, and what the partnership is *not* intended to do, guarantee or create.
- ❑ Financial agreements, including which agency will pay for each item and when payment is due.
- ❑ Risk-sharing understandings concerning who will bear the risk in case of a mishap. Ideally, indemnification provisions would be mutual, with each party responsible for its own acts or omissions and able to pay.
- ❑ A plan to resolve disputes or differences.
- ❑ A plan to regularly review and update Agreement.
- ❑ Signatures of each agency's representative who is authorized to bind the organization contractually (and signatures of witnesses).

If the Vulnerability Analysis revealed a surplus, approach agencies that may be in need.

Additional Resources

- ★ For suggestions on how funders can be more effective and strategic in addressing disasters: *Disaster Grantmaking: A Practical Guide for Foundations & Corporations*, Council of Foundations, www.cof.org.

TASK: LOCATE ALTERNATE FACILITIES

The **alternate facility** is where agency operations will be conducted after a disaster. Identifying a location and putting agreements or leases into place in advance will allow your agency to return to providing services as quickly as possible. Knowing that plans are in place to continue operations and that an alternate site is already established will give your personnel and your customers peace of mind.

As a first step, identify for each department or program the space, staff and other resources required on the **Alternate Facilities Worksheet**. Once those needs have been established, it will be clear about what an alternative site will have to provide. It may be that not all programs need to be housed together in the same facility or that an alternate site may be needed only for particular functions.

Next, evaluate possible alternate sites with the same criteria used in the Vulnerability Analysis of your primary facility (see **Considerations for a Vulnerability Analysis**). Selecting a building in the same flood zone as your primary facility, for instance, is not going to allow continuity of operations if there's a flood.

In selecting an alternate facility, consider:

- Where can mission-critical functions and agency operations safely and efficiently re-locate?
- Is there adequate space for all functions? Is parking available and sufficient?

- Is this site on the same electrical power grid or flood zone as our primary facility?
- Does the organization already at this facility need to be back in business? How soon?
- In addition to the site, are alternate equipment, materials, phone and data lines, etc. available?
- How many bathrooms? Do they include showers?
- Is there a full kitchen?
- Is shelter-in-place for staff and their families at the alternate facility an option? Is there enough space to house staff from other agencies?
- If a central alternate facility is not available, can key staff be placed throughout the area at various locations; for example, can administrative functions be put in a location further away from the target population?
- What organization will be responsible for obtaining the site and paying the costs incurred after a disaster, e.g., rent, maintenance, damages, and utilities?

Use the **Relocation Site Worksheet** to outline which staff and essential functions will be set in the alternate facility and to inform personnel. The final step is to set up mutual aid agreements or short-term leases.

Keep the keys to alternate site(s) and information on security and access in a secure, off-site location.

RELOCATION SITE WORKSHEET

LOCATION	BUILDING OWNER / MANAGER
Address: City, State, ZIP: Directions: Flood Zone:	Name: Phone: Alternate Phone: Pager: E-mail:
ESSENTIAL FUNCTIONS TO ESTABLISH HERE	STAFF TO DEPLOY HERE
1. 2. 3. 4. 5. 6.	1. 2. 3. 4. 5. 6.

NOTES (e.g., where are keys, how to access building, security code, procedure for re-directing mail and supply shipments, etc.)

TASK: DEVELOP A COMMUNICATIONS PLAN

A **Communications Plan** is needed to keep *everyone* apprised of your operations throughout the emergency: personnel, customers, community leaders, first responders, creditors, suppliers, Board of Directors, funders, regulatory agencies, government agencies, the media and the general public. As changes in status or location occur throughout the relocation and recovery period, it will be important to keep information current and forthcoming.

Who, What, When & How. The “message” portion of a Communications Plan consists of several components. Logistical concerns involve the communications equipment and how and when communications will be restored. This means determining what type of equipment is needed to support and backup each essential function, prioritizing which kind of communication equipment or system should be restored first and for which agency program or department, and establishing in advance how your communications vendors will restore services in an emergency.

When it comes to who needs what information, consider multiple communication plans because the information needed by one group, such as personnel, is likely to differ from the information needed by customers or funders. Who delivers the message and through what means will likely differ as well. A basic Communications Plan, regardless of the target audience, should address:

- ❑ Crucial information to be delivered before, during and after a crisis.
- ❑ Opportunities for effective communications and how they can be maximized.
- ❑ Obstacles to effective communications and how they can be minimized.
- ❑ Likely questions.

It may be useful to complete a **Communications Overview** to outline a basic message for everyone and specific information for each type of audience, from whom and how they will receive the message, and the equipment needed.

Make Contact. When it comes to making contact during an emergency, leave no means of communication undocumented. The agency should have a record of the numbers for all types of communication including cells, landlines, pagers, beepers, satellite phones, and fax machines for each employee, customer, vendor, funder, and so on. In addition, the numbers and e-mails of employees’ spouses and children should also be collected. Complete a **Key Contact Worksheet** for every supplier, creditor, financial institution, partner or other organization with which your agency does business. Include information on their disaster plans.

Making contact with agency personnel is one of the first and perhaps most important task to accomplish after a disaster or emergency. The logistics of making contact is

something the COOP Team should address during the Vulnerability Analysis and when establishing mission-essential functions. Suggestions from emergency preparedness planners are included in ***Communications: Top Tips***.

IN CASE ALL ELSE FAILS . . .
Establish a rendezvous time and place where
all personnel are to report after a disaster.

Public Information Plan. With regard to providing information to the public, the ***Agency Disaster Information Sheet*** should be adapted and submitted to the media and various local, state and federal agencies that are a part of the disaster recovery process. Their contact information is provided on the ***Tampa Bay Media and Local, State & National Organization Contact Lists***.

It is critical that Pinellas County agencies make contact early and often with the 2-1-1 Tampa Bay Cares, Inc. call center regarding agency closure, relocation, re-opening, change in hours of operation, status of building, status of services, etc. Information regarding status of agencies will be shared with the Disaster Recovery Leadership Network in order to facilitate assistance to agencies. Include enews@211tampabay.org on your media contact list so that 2-1-1 will receive all press releases on a regular basis. This will aid them in tracking provision of services to the community on a regular basis in addition to times of disaster.

The ***Emergency Contact List*** should be completed and posted throughout your agency. It should also be included as part of the agency's vital documents and materials sent to the relocation site along with the ***Tampa Bay Media*** and ***Local, State & National Organization Contact Lists***.

Additional Resources

- ★ For advice on public information & media relations: *Communicating in a Crisis: Risk Communication Guidelines for Public Officials*, U.S. Dept. of Health & Human Services, www.riskcommunication.samhsa.gov.
- ★ For information on ham radio & links to other resources: *Amateur Radio*, <http://en.wikipedia.org>.

COMMUNICATIONS: TOP TIPS

ELECTRONICS

- ✧ An automated emergency-alert notification service can send messages to any number of individuals or groups. Some are web-based and send text messages with real-time response confirmation (e.g., ReadyAlert Notification Services; Pinellas County 1-888-689-8905), while other services leave phone messages (e.g., Community Voice Mail).
- ✧ Recent crises have indicated that text messaging is a faster way to communicate than e-mail.
- ✧ Set up a free e-mail account (e.g., HotMail or Yahoo) for emergency use.
- ✧ Be able to update agency website from outside the facility.

PHONES

- ✧ In an emergency, an out-of-state phone number may be easier to connect with than an in-state number.
- ✧ Landline phones (handset is directly connected to the base) are likely to work during a power outage because the phone companies have extensive back-up systems. Cordless phones require electricity to function while cell phones need electricity for charging.
- ✧ Cell phones will work as long as the cell towers are functioning but system overload in the event of a disaster may prevent calls from going through. System overload may also affect satellite phones.
- ✧ Invest in a surge protector with battery backup so that a power surge through the phone lines won't also destroy a computer connected through a modem.

PHONE TREE

- ✧ Organize a phone tree or call-down procedure by geography. In case phones fail, employees living near each other can try to make face-to-face contact.
- ✧ Test the phone tree on a Sunday evening to see how well it works.
- ✧ Emergency call lists for staff should be wallet size if possible and include how to access their agency e-mail from alternate sites.

HAM RADIO

- ✧ Amateur radio operators, or hams, are best known for the emergency communications they provide when electricity or phone lines are not functioning. Hams are licensed by their government to communicate both domestically and internationally on a wide variety of radio bands.
- ✧ Consider buying ham radio equipment (usually costs less than \$200) and getting an operator's license.

COMMUNICATIONS OVERVIEW

MESSAGE TO ALL GROUPS

AUDIENCE	ADDITIONAL INFO	MEANS OF COMMUNICATION (phone, e-mail, website, etc.)	EQUIPMENT NEEDED	SPOKESPERSON/ RESPONSIBLE STAFF
Personnel				
Customers				
Suppliers/Vendors				
Board of Directors				
Media				
Community Partners				
Recovery Assistance Agencies				

KEY CONTACT WORKSHEET

BANK / CREDITOR / VENDOR / AGENCY	PRIMARY CONTACT
Name: Address: City, State, ZIP: Company Phone: Web address: Materials/Service Provided: Account Number:	Name: Title: Phone: Cell: Pager: Fax: E-mail:
WHAT IS THEIR DISASTER PLAN?	ALTERNATE CONTACT
How will we continue business in a disaster? Where will they relocate? Who will be in charge?	Name: Title: Phone: Cell: Pager: Fax: E-mail:

NOTES:

AGENCY DISASTER INFORMATION SHEET

AGENCY:

PRIMARY FACILITY	ALTERNATE LOCATION
Address: Phone: Fax: E-mail: Evacuation Zone:	Address: Phone: Fax: E-mail: Evacuation Zone:
CRISIS MANAGER / SPOKESPERSON	ALTERNATE CRISIS MANAGER
Name: Phone: Alternative Phone: E-mail:	Name: Phone: Alternative Phone: E-mail:
RESPONSE TEAM MEMBERS & PHONE NUMBERS	MUTUAL AID AGREEMENTS (list with whom for what)
1. 2. 3. 4. 5. 6. 7. 8.	1. 2. 3. 4. 5. 6. 7. 8.

PRIORITY	MISSION-ESSENTIAL FUNCTIONS	RESPONSIBLE STAFF
1		
2		
3		
4		
5		
6		

DISTRIBUTE TO:

TAMPA BAY MEDIA CONTACT LIST

Include enews@211tampabay.org on your press release/media list so that 2-1-1 Tampa Bay Cares, Inc. will receive all your press releases on a regular basis. This will aid the 2-1-1 call center in tracking provision of services to the community on a regular basis in addition to times of disaster.

NEWSPAPERS	PHONE	WEB ADDRESS
<i>St. Petersburg Times</i>	727-893-8111	http://connect.sptimes.com
<i>Tampa Tribune</i>	813-259-7711	www.tampatrib.com
TV STATIONS		
Bay News 9	727-329-2400; 888-437-1239	www.baynews9.com/E-mail-staff.html?tips
WFTS—ABC	1-800-920-2828; 813-354-2828	www.abcactionnews.com
WTSP—CBS	727-577-1010	10news@tampabays10.com
WFLA—NBC	813-221-5788	www.wfla.com
WTVT—FOX	813-870-9630	www.myfoxtampabay.com/myfox/pages/InsideFox/Contactus
WEDU—PBS	813-254-9338	www.wedu.org
WUSF—PBS	813-974-8700	www.wusf.org
WVEA—Univision (Spanish)	813-872-6262	-----
OTHER		
Community Radio WMNF 88.5	813-238-8001	www.wmnf.org/community_announcement/submit

LOCAL, STATE & NATIONAL ORGANIZATION CONTACT LIST

LOCAL	PHONE	WEB ADDRESS
2-1-1 Tampa Bay Cares, Inc.	2-1-1	www.211tampabay.org
American Red Cross—Tampa Bay	813-348-4820	www.redcrossbc.org
Salvation Army	813-267-8913 (727-550-8080 administrative office)	www.salvationarmystpetersburg.org
United Way	813-274-0900	www.uwtb.org
Pinellas County Emergency Management	727-464-3800 727-464-4333	www.pinellascounty.org/emergency/
National Disaster Medical Assistance Team—Tampa Bay	-----	http://fl3dmat.org/
Hillsborough Emergency Preparedness	813-272-6408	www.hillsboroughcount.org/emergency/
Pasco Emergency Preparedness	727-847-8137	www.pascocountyfl.net/oem/index.asp
Institute for Business & Home Safety	813-286-3400	www.ibhs.org
STATE / REGIONAL		
FEMA Regional Office (Atlanta, Region 4)	404-853-4200	www.fema.gov
Florida Dept. of Financial Services	1-800-342-2762	www.myfloridacfo.com
Florida Division Emergency Management	-----	www.floridadisaster.org/
My Safe Florida Home	866-513-6734	www.mysafefloridahome.com
Volunteer Florida Emergency Management	850-921-5172	www.volunteerflorida.org/secondqui/emergencymgmt.html
State Emergency Management Agency	904-488-1900	www.floridadisaster.org
NATIONAL / GOVERNMENT		
Small Business Administration Disaster Recovery	1-800-359-2227	www.sba.gov/localresources/disasteroffices/disaster_recov/index.html
U.S. Dept. of Homeland Security	202-282-8000	www.dhs.gov/dhspublic/ ; To contact: http://contact.dhs.gov
National Disaster Medical System	877-696-6775	www.oep-ndms.dhhs.gov/
Federal Emergency Management Agency	202-566-1600	www.fema.gov/index.shtm
National Emergency Management Association	859-244-8000	www.nemaweb.org
Internal Revenue Service, Taxpayer Advocate Service	877-777-4778	www.irs.gov

EMERGENCY CONTACT LIST

OUR AGENCY	FIRST RESPONDERS
Building Manager: Building Security: Spokesperson:	Ambulance: Local law enforcement: Nearest fire station: Nearest hospital:
INFORMATION TECHNOLOGY	CONTRACTORS
In-House Tech Support: E-mail Service: Internet Provider: Website Host: Computer Repair: Data Restoration:	AC/Heat: Electrician: Engineer: Hazardous Materials: Industrial clean-up: Mold remediation: Plumber: Repair/restoration: Tree service: Window repair/replacement:
OTHER AGENCY SUPPORT	UTILITIES
Benefits Administration: Billing/Invoicing Service: Payroll Processing:	Electric: Gas: Sanitation/trash pickup: Sewer: Telephone: Water:

TASK: PREPARE & SUPPORT PERSONNEL

A human service agency's most valuable assets are its human resources. But if shortly before a hurricane, employees and volunteers are at home packing their disaster supplies kit, they won't come to work. Afterwards, if they're caring for their families because the child care centers have closed due to a lack of electricity, they can't help re-establish essential functions. In short, if your employees and volunteers are not prepared, your agency will fail. A plan to prepare and support agency personnel is a key component of a COOP.

Before a disaster, employees and volunteers will need to understand the COOP and to have a personal disaster plan. Afterwards, they will need reassurance and support. The following forms should be included as part of the paperwork completed at the initial hiring and entered into the COOP database: ***Disaster Availability, Family Evacuation Plan, and Family Information Sheet.*** The ***Personal Preparedness Checklist*** should be provided all staff and volunteers or included in the Employee's Handbook.

The Employee's Handbook should also outline the elements of the COOP most relevant to personnel such as the Communications Plan, emergency closing policy, and their responsibilities with regard to training and testing.

Of particular concern to personnel will be how (if) payroll will be continued in the event of a temporary closure or

re-location. During the COOP process, the COOP Team should explore the feasibility of providing staff with cash advances, salary continuation, and flexible or reduced work hours. Other types of post-disaster support to consider include shelter for staff and their families, helping them get provisions and supplies, setting up on-site emergency day care, and crisis counseling.

PREPARE YOUR CUSTOMERS, TOO!
Complete with your customers the ***Family Evacuation Plan and Family Information Sheet*** and include them in their files. Provide customers with the ***Personal Preparedness Checklist.***

Additional Resources

- ★ *Guide on the Special Needs of People with Disabilities for Emergency Managers, Planners & Responders*, National Organization on Disability, <http://redcross.tallytown.com/library/GuideOnTheSpecialNeedsOfPeopleWithDisabilities.pdf>.
- ★ For a comprehensive on-line library of disaster preparedness and planning articles and checklists: American Red Cross, <http://redcross.tallytown.com/educate.html#004>.

DISASTER AVAILABILITY

NAME:

POSITION:

PHONE:

In the event of a hurricane, would you be available to work:

- | | | |
|-----|----|-----------------------------|
| YES | NO | 48-72 hours before landfall |
| YES | NO | 12-24 hours before landfall |
| YES | NO | During the hurricane |
| YES | NO | 12-24 hours after landfall |
| YES | NO | 48-72 hours after landfall |

What type of support will you need to continue working?

- | | | |
|-----|----|--|
| YES | NO | Shelter for yourself |
| YES | NO | Shelter for your family |
| | | If yes, how many family members? _____ |
| YES | NO | Shelter for pets |
| YES | NO | Transportation |
| YES | NO | Child care |
| | | If yes, how many children? _____ |
| YES | NO | Other needs, please specify _____ |

What type of work would you be willing to do for the duration of the crisis?

- | | |
|--|--|
| <input type="checkbox"/> Administrative/Clerical | <input type="checkbox"/> Communications |
| <input type="checkbox"/> Maintenance/Repair | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Medical | <input type="checkbox"/> General support |

Please list any special skills or abilities you have, e.g., languages, know first aid, certifications/degrees

FAMILY EVACUATION PLAN

NAME:

POSITION:

PHONE:

EVACUATION PLAN

- | | | |
|-----|----|---|
| YES | NO | Will you/your family have to evacuate in a hurricane?
If yes, indicate Evacuation Level _____
(To find evacuation zone and nearest shelter: http://pubgis.co.pinellas.fl.us/hurricane.txt/) |
| YES | NO | Is your home elevated above Base Flood Elevation? |
| YES | NO | Is your home a mobile home? |
| YES | NO | Will you or a loved one require evacuation assistance due to special needs?
If yes, contact your local emergency management department to register. |

If I do not have to evacuate, I will secure my house and stay. My employer can reach me at:

- Address:
- Home Phone:
- Cell Phone:
- Other Phone:
- E-mail:

If told to evacuate, I will go to: ____ Family ____ Friend ____ Hotel/Motel ____ Shelter

- Address:
- Home Phone:
- Cell Phone:
- Other Phone:
- E-mail:

If I leave the immediate area, I will go to:

Evacuation Route:

FAMILY INFORMATION SHEET

NAME:

POSITION:

PHONE:

FAMILY MEMBERS	
First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:	First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:
First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:	First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:
First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:	First & Last Name: Relationship: Age: Cell phone: Employed by: Special needs/conditions:
PETS	
Type of animal: Name: Tag number: Veterinarian & phone: Sheltered during hurricane at:	Type of animal: Name: Tag number: Veterinarian & phone: Sheltered during hurricane at:
Type of animal: Name: Tag number: Veterinarian & phone: Sheltered during hurricane at:	Type of animal: Name: Tag number: Veterinarian & phone: Sheltered during hurricane at:

PERSONAL PREPAREDNESS CHECKLIST

TO DO:
<ul style="list-style-type: none"> <input type="checkbox"/> Read disaster preparedness guide provided by your agency &/or local emergency management organization. <input type="checkbox"/> Provide employer, relatives and friends with your emergency contact information & evacuation plans. <input type="checkbox"/> Inventory your belongings (a video recording is recommended) & place it along with other important documents in a secure, waterproof, fireproof off-site location. <input type="checkbox"/> Call your insurance agent to make sure you are adequately covered. Put your policies & agent's contact information in safe place. <input type="checkbox"/> Make a list of tasks & the family member responsible for each; include the children. <input type="checkbox"/> Compile a list of important numbers, e.g., doctors, contractors. <input type="checkbox"/> Back up home computer files. <input type="checkbox"/> Put together your family's Disaster Supplies Kit & your Personal Evacuation Kit in case you are deployed to your place of work. <input type="checkbox"/> Inspect & secure your home before the storm. <input type="checkbox"/> Gas car, get cash, stockpile non-perishable food & water.
PACK PERSONAL EVACUATION KIT:
<ul style="list-style-type: none"> <input type="checkbox"/> 2-week supply of prescription medicines (must be labeled with name & dosage, even over-the-counter & samples) <input type="checkbox"/> 2-week supply of non-perishable/special dietary food (ready-to-eat meals, canned meat/tuna/fruits/veggies, energy bars) <input type="checkbox"/> Personal items (eyeglasses, toothbrush, toothpaste, deodorant, etc.) <input type="checkbox"/> One complete change of clothing (long-sleeved shirt, long pants), closed-toe shoes/boots <input type="checkbox"/> Rain gear <input type="checkbox"/> Cash <input type="checkbox"/> Important documents, e.g., employee id, insurance cards, bankbooks, medical info, address book <input type="checkbox"/> Quiet games, playing cards, etc. <input type="checkbox"/> Books & individual book light <input type="checkbox"/> Flashlight, batteries, lightstick

Additional Resources

- ★ "2007 Hurricane Guide," *St. Petersburg Times*, tampabay.com (available through Nov. 30).
- ★ *Hurricane Handbook*, Pinellas County Emergency Management, www.pinellascounty.org/emergency/default.htm.
- ★ *Disaster Preparedness for Pets*, Humane Society, www.hsus.org/hsus_field/hsus_disaster_center/resources/disaster_preparedness_for_pets.html.
- ★ For a comprehensive on-line library of disaster preparedness & planning articles & checklists: American Red Cross, <http://redcross.tallytown.com/educate.html#004>.

TASK: PROTECT VITAL RECORDS & DATABASES

Vital records are those documents, files, and data that are necessary for performing essential functions. They are those records that your agency cannot operate without. A vital record is one which is impossible to re-create and is required for agency operations, for legal reasons, or by a regulatory agency. Use the examples provided on the **Vital Records Checklist** to determine which are necessary for your agency's functioning and survival.

The COOP Team should identify the sub-set of vital documents needed to perform essential functions during the disaster relocation and recovery process, along with where they are located, who has access to them, and the equipment and other resources needed to access them. Some documents such as health records may require a high level of security to access and this issue should be addressed in the COOP.

Save vital records in both electronic and paper forms and in multiple locations: (1) fireproof, waterproof place on the premises, (2) secure off-site local location, and (3) secure location at least 50 miles away.

As much as possible, vital paper documents should be scanned and copied to an electronic source. A policy should be in place for regular and routine data backups. A variety of options are available for off-site electronic backup:

- ❑ *Data Storage Service* or online data backup service which involves transferring files over the internet and storing them in secure, offsite vaults.
- ❑ *Co-location Server* which allows data from one place to be mirrored at the co-location site. A co-location server can be set up with another agency in different area or through a company that provides this service.
- ❑ *Staff Backup* in which each staff member or department head keeps a set of disks or memory sticks at his/her residence that pertains to his/her section of the business, with the agency president/CEO or office manager the only person to have an entire set of electronic files (also kept at his/her residence). These files should be updated quarterly, or as necessary. The person with the entire set of files should also have a computer at his/her residence in case the primary facility office is damaged or destroyed. A third set of the electronic files could be sent to a trustworthy entity in another state. These files could be updated annually or semi-annually.

Additional Resources

- ★ For suggestions on protecting data & backup routines: *COOP for Smaller Community-Based Organizations Toolkit*, Volunteer Florida, pgs. 52-54, www.volunteerflorida.org.
- ★ For articles & discussion boards on tech/computer info: TechSoup, www.techsoup.org.

VITAL RECORDS CHECKLIST

FINANCIAL RECORDS & INFO	LEGAL DOCUMENTS, CONTRACTS & AGREEMENTS
<ul style="list-style-type: none"> <input type="checkbox"/> Bank & CD account numbers & balances, checkbooks <input type="checkbox"/> Company credit/debit card account numbers & balances <input type="checkbox"/> Accounts receivable information <input type="checkbox"/> Employee payroll, health insurance, retirement plans, Social Security, etc. <input type="checkbox"/> Insurance policies <input type="checkbox"/> Extended warranties &/or policies <input type="checkbox"/> Phone, utilities, other account numbers <input type="checkbox"/> Tax records 	<ul style="list-style-type: none"> <input type="checkbox"/> Contracts & mutual aid agreements <input type="checkbox"/> Building leases <input type="checkbox"/> Equipment leases, e.g., copier, postage machine, computers <input type="checkbox"/> Vehicle leases & registrations <input type="checkbox"/> City, county & state business licenses <input type="checkbox"/> Copy of original charter <input type="checkbox"/> Agency by-laws & handbooks <input type="checkbox"/> Current strategic or business plan
GRANT-RELATED DOCUMENTS	PERSONNEL & CUSTOMER INFO
<ul style="list-style-type: none"> <input type="checkbox"/> Proposals & applications <input type="checkbox"/> Strategic plans <input type="checkbox"/> Progress reports <input type="checkbox"/> Most recent quarterly & annual reports <input type="checkbox"/> Minutes from last 4-6 board meetings for history & continuity <input type="checkbox"/> Research data 	<ul style="list-style-type: none"> <input type="checkbox"/> Medical, clinical, educational degrees earned by staff <input type="checkbox"/> Customer/patient files <input type="checkbox"/> Personnel files <input type="checkbox"/> Volunteer files <input type="checkbox"/> Emergency contact information <input type="checkbox"/> Training manuals
DOCUMENTS REQUIRED FOR SMALL BUSINESS ADMINISTRATION DISASTER LOAN	MISCELLANEOUS
<ul style="list-style-type: none"> <input type="checkbox"/> Current (dated within 90 days of application) balance sheet, profit-loss statement & schedule of liabilities <input type="checkbox"/> Personal financial statements for each proprietor, or general partner and limited partner owning 20% or more interest, or each stockholder or entity owning 20% of more voting stock <input type="checkbox"/> 3 past years of applicant's federal income tax returns, including all schedules <input type="checkbox"/> Tax Information Authorization (IRS Form 8821) <input type="checkbox"/> Most recent tax return and signed IRS Form 8821 for each affiliate, i.e., business parents, subsidiaries or other businesses with common ownership or management <input type="checkbox"/> Other documents as requested 	<ul style="list-style-type: none"> <input type="checkbox"/> Current membership/donor list, member contact information, records of membership dues <input type="checkbox"/> Minutes from critical committees the agency hosts or attends <input type="checkbox"/> Building/site maps indicating utility shutoffs, water, sewer & gas lines, floor plans, fire extinguishers, exits, stairways, designated escape routes, restricted areas <input type="checkbox"/> Diagrams of computer network structure & current computer configurations <input type="checkbox"/> Personnel's e-mail address books <input type="checkbox"/> Computer passwords <input type="checkbox"/> Instruction/operating manuals for computers, etc.

TASK: CONDUCT AN INVENTORY

Like most organizations today, yours is probably heavily dependent on modern technology and equipment. These items would need to be replaced if they were damaged or destroyed, making an up-to-date inventory essential for insurance purposes. For each piece of equipment your agency owns or leases, record its make, model, serial number, descriptive information (e.g., RAM, CPU capability, size, color), when and where it was purchased, cost, and its lease or warranty expiration date. Another form of documentation would be to create a binder or portfolio containing all the purchase receipts, instruction manuals, and warranty information. In addition, a video recording of the facilities and inventory is highly recommended.

Each department or program should create a separate ***Inventory Worksheet*** (and/or binder) for each category of equipment:

- Computer Hardware:** monitors, keyboards, towers, laptops, and peripherals such as zip drives, scanners, printers.
- Computer Software:** note that software may vary by individual department or computer.
- Media:** TVs, DVD/VCR players, stereo.
- Communication:** fax machines, phones (landline, cell, satellite), pagers, beepers, walkie-talkies.
- Office Equipment & Furniture:** copiers, calculators, cameras, file cabinets, desks.

- Vehicles:** fleet cars, vans, buses; include vehicle id number, license plate, and registration information.
- Medical Equipment,** if applicable.
- Items with Chargers or Batteries:** while cell phones, laptops, etc. will also be inventoried on other worksheets, having one list of all items requiring batteries or chargers will be invaluable in the few days prior to a hurricane when they will all need to be tested or charged. Write on the outside of items such as a flashlight, camera or radio what kind of batteries it takes and how many.

In addition, an inventory should be conducted of:

- Consumable or any materials purchased or produced in large amounts, e.g., brochures, flyers, giveaways.
- Personal items from each employee's office.

Pre-arrange with vendors to quickly replace damaged vital computer or communications equipment or to meet needs at the alternate site.

Additional Resources

- ★ To document the software being used on a Windows computer: www.belarc.com/free_download.html, Belarc Advisor (Mac users can use System Profiler which is part of every Mac).

TASK: COLLECT DISASTER SUPPLIES

Disaster supplies will be needed whether your agency relocates or shelters staff in-house. Consider using portable storage units to store supplies, especially if storage space is limited at your primary or alternate facility.

Most of the items on the ***Disaster Supplies Checklist*** are very inexpensive (e.g., first aid supplies) or already purchased and available (e.g., office supplies). Emergency provisioning procedures can be set up with many vendors and suppliers such as big-box stores but these must be done well in advance of a disaster because credit agreements may be involved and will take time to resolve. Such arrangements may be necessary, however, if you expect to house and/or feed a large number of staff and possibly their families as well. For human service agencies such as soup kitchens or homeless shelters, pre-arranged agreements are a must.

For 24-hour year-round warnings of severe weather and other hazards, consider purchasing a NOAA Weather Alert Radio with Specific Area Message Encoding. It remains silent until an alert is issued by local authorities at which point the alarm sounds and specific information and instructions are provided.

ESSENTIAL OFFICE SUPPLY . . .

AGENCY LETTERHEAD & BUSINESS CARDS

Government agencies and potential funders and donors will want to know that they are dealing with an **authorized** person who serves in an **official** capacity with a **legitimate** organization. **The more proof you can provide as to your position and your agency's legitimacy, the more likely your requests will get attention and your agency's and customers' needs met.**

Additional Resources

- ★ For estimated costs of disaster supplies: *Open for Business: A Disaster Planning Toolkit for the Small to Midsized Business Owner*, Institute for Business & Home Safety, pg. 44, www.ibhs.org/docs/openforbusiness.pdf.

DISASTER SUPPLIES CHECKLIST

FIRST AID	PROVISIONS
<ul style="list-style-type: none"> <input type="checkbox"/> First aid book <input type="checkbox"/> 20 adhesive bandages, various sizes <input type="checkbox"/> 6 sterile dressing/gauze pads, various sizes <input type="checkbox"/> 3 rolls gauze bandages <input type="checkbox"/> Adhesive tape, 2" width <input type="checkbox"/> Antiseptic wipes or waterless alcohol-based hand sanitizer <input type="checkbox"/> Anti-bacterial ointment <input type="checkbox"/> 2 pair large medical-grade non-latex gloves <input type="checkbox"/> Cold pack <input type="checkbox"/> Scissors <input type="checkbox"/> Tweezers <input type="checkbox"/> CPR breathing barrier/face shield <input type="checkbox"/> Over-the-counter meds: aspirin/pain reliever, anti-diarrheal, antacid, syrup of Ipecac (used to promote vomiting), sleep aid 	<ul style="list-style-type: none"> <input type="checkbox"/> Flashlights & batteries for each employee <input type="checkbox"/> Portable radio/TV, batteries <input type="checkbox"/> Mosquito repellent, citronella candles <input type="checkbox"/> Fire extinguisher (small canister, ABC type) <input type="checkbox"/> Instant tire sealer <input type="checkbox"/> Whistle &/or distress flag <input type="checkbox"/> Plastic tarps, screening, tools, nails, duct tape, etc. <input type="checkbox"/> Clean-up supplies (mop, buckets, towels, disinfectant) <input type="checkbox"/> Camera, film, batteries <input type="checkbox"/> Garbage can or bucket with tight-fitting lid (for emergency toilet) <input type="checkbox"/> Plastic trash bags <input type="checkbox"/> Toilet paper, paper towels, pre-moistened towelettes <input type="checkbox"/> Pillows, blankets, sleeping bags, air mattresses <input type="checkbox"/> Folding/lawn chairs or cots
OFFICE SUPPLIES	FOOD & WATER
<ul style="list-style-type: none"> <input type="checkbox"/> Letterhead, business cards <input type="checkbox"/> Pens, pencils, markers <input type="checkbox"/> Stapler, staples, staple remover <input type="checkbox"/> Paper clips, binder clips <input type="checkbox"/> Calculator <input type="checkbox"/> Paper, e.g., notebooks, printer/copier paper <input type="checkbox"/> File folders <input type="checkbox"/> Envelopes & stamps <input type="checkbox"/> Phone book (white & yellow pages) 	<ul style="list-style-type: none"> <input type="checkbox"/> Drinking water, 1 gallon per person per day (minimum 3 day supply) <input type="checkbox"/> Water purification kit (tablets, chlorine (plain), iodine) <input type="checkbox"/> Non-perishable food (minimum 3 day supply) <input type="checkbox"/> Non-electric can opener <input type="checkbox"/> Food containers, utensils, plates, cups <input type="checkbox"/> 2 coolers (one for food; one to get ice) <input type="checkbox"/> Infant necessities (medicine, sterile water, formula, diapers, bottles) if needed <input type="checkbox"/> Charcoal, wooden matches/lighters, grill

PRECIOUS COMMODITIES BEFORE & AFTER A DISASTER

- Cash (banks may be closed, checks/credit cards not accepted, ATMs not operating)
- Gasoline (without power, gas pumps won't operate)
- Ice

TASK: MANAGE SPONTANEOUS VOLUNTEERS

Spontaneous volunteers (also called “unaffiliated” or “convergent” volunteers) are individuals who are not associated with any recognized disaster response agency, but who appear on the scene or call to offer assistance. They can provide a wide range of experience, skills and training—resources often in short supply after a catastrophic event. They may also provide equipment such as tools, generators and vehicles or donate food, water and other necessities.

Remind spontaneous volunteers to first provide aid to their own neighbors & neighborhood.

Volunteer Coordination Team. Forming a Volunteer Coordination Team and designating a Volunteer Coordinator is strongly recommended. The Team will not only be an important part of the COOP process but it will also be a critical component of the relocation and recovery processes. Some of the team’s pre- and post-disaster duties are outlined in ***Volunteer Coordination Team Tasks***. Many administrative and logistical matters need to be addressed in advance:

- How many volunteers could our agency use and what will be the skills we will need?
- Where and how can spontaneous volunteers be quickly and efficiently registered and assigned tasks?
- What will be the space, staff and equipment requirements?

- How will agency personnel communicate with volunteers?
- How do we get those volunteers with particular skills to the places where they can do the most good?
- Where will they stay?
- Who will feed them and how?
- What happens if somebody gets hurt?
- Under what circumstances should background checks be conducted? Will background checks even be feasible?

DOCUMENT, DOCUMENT, DOCUMENT
all volunteer activities, training, expenses incurred, time donated and the dollar value of the donated time. These will be needed for FEMA reimbursement, for funders and granting agencies and possibly for insurance claims and loan applications.

Pinellas County Volunteer Reception Center. If past disasters are any indication, the Tampa Bay area can expect *tens of thousands* of people to volunteer in the event of a major hurricane. In the event of a major disaster, 2-1-1 Tampa Bay Cares, Inc. and the United Way of Tampa Bay plan to set up at least one large-scale Volunteer Reception Center. Here, spontaneous volunteers will be registered, interviewed and referred to agencies needing their services. Local agencies wanting

volunteers need only call 2-1-1 with their requests. Your agency, however, must still have in place its own policies on managing volunteers once they arrive at your site as well as its own procedures for documenting their activities.

Community Collaboration. Another aspect of volunteer management involves pre-disaster collaboration and community involvement. Identifying potential volunteer opportunities and priority needs before an emergency will expedite community involvement following a disaster. This can be done through:

- ❑ Outreach to organizations that use or might need volunteers.
- ❑ Involvement with existing community coalitions, e.g., Community Organizations Active in Disaster and Citizen Corps Councils.
- ❑ Linkages with regional or national groups with the capabilities to manage unaffiliated volunteers during disaster operations, e.g., National Voluntary Organizations Active in Disaster.

**LINE UP YOUR POST-DISASTER
VOLUNTEERS NOW
to allow time for registration, screening,
background checks, and training.**

Additional Resources

- ★ *Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure & Good Intentions*, National Voluntary Organizations Active in Disaster, <http://redcross.tallytown.com/library/ManagingSpontaneousVolunteersInTimesOfDisaster.pdf>.
- ★ *They Will Come: Post-Disaster Volunteers & Local Governments*, California Governor's Office of Emergency Services, <http://redcross.tallytown.com/library/TheyWillComePost-DisasterVolunteersAndLocalGovernments.pdf>.
- ★ *Unaffiliated Volunteers in Response & Recovery*, Florida Commission on Community Service, <http://redcross.tallytown.com/library/UnaffiliatedVolunteersInResponseAndRecovery.pdf>.
- ★ For legal & liability considerations in volunteer management: *Health & Human Services Disaster Recovery Leadership Network Operations Manual*, Draft 02.08.07, pgs. 28-34.
- ★ To review recent Florida statutes related to volunteer management: Title X, Chapter 110, Part IV, www.flsenate.gov/statutes/idex.cfm.

VOLUNTEER COORDINATION TEAM TASKS

PRE-DISASTER	POST-DISASTER
ADMINISTRATIVE TASKS	ADMINISTRATIVE TASKS
<ul style="list-style-type: none"> <input type="checkbox"/> Develop the forms and documents needed for registration, screening and interviewing. <input type="checkbox"/> Research liability issues and laws related to using unaffiliated volunteers. Ensure that organizations accepting referred volunteers are aware of applicable state liability laws and insurance issues. <input type="checkbox"/> Review liability and insurance policies and determine liability authority related to using unaffiliated volunteers. <input type="checkbox"/> Develop procedures for documenting volunteer activities, training, expenses, time donated, the dollar value of donated time, skills, and success stories. <input type="checkbox"/> Establish agreements with local or state emergency management agencies regarding expense reimbursement and required documentation. <input type="checkbox"/> Develop methods to evaluate volunteers' experience. 	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure spontaneous volunteers complete registration, release of liability, and other forms. <input type="checkbox"/> Conduct interviews to determine volunteers' skills, abilities and limitations. <input type="checkbox"/> Provide volunteers with identification tags or bracelets with the date, agency name and phone. <input type="checkbox"/> Provide brief on-the-spot training about job descriptions, responsibilities, basic safety, sign-in/-out procedures, and dealing with the media. <input type="checkbox"/> Ensure that all volunteer activities, training, expenses, time donated, and the dollar value of donated time are documented and backed up. <input type="checkbox"/> Record success stories and document with photos or video of volunteers at work.
LOGISTICAL TASKS	LOGISTICAL TASKS
<ul style="list-style-type: none"> <input type="checkbox"/> Find a location suitable to processing hundreds of volunteers. It may be within the alternate site or possibly an entirely different location. <input type="checkbox"/> Establish what communications, computer and other equipment will be needed at the Volunteer Reception Center. <input type="checkbox"/> Build a Volunteer Coordination "Go Kit" that includes office supplies, forms, lists, maps, special equipment, etc. 	<ul style="list-style-type: none"> <input type="checkbox"/> Set up a Volunteer Reception Center where volunteers will be registered and referred to their "job sites." <input type="checkbox"/> Maintain a supply of volunteer sign-in sheets at each volunteer worksite. <input type="checkbox"/> Establish communications capability and network access. <input type="checkbox"/> Provide volunteer support, including food and transportation.

TASK: COPE WITH TRAUMATIZED INDIVIDUALS

In the event of a major disaster, distress, anxiety and fear will be widespread and affect hundreds or thousands of people, including community leaders, first responders, and quite possibly your own staff. Personnel and volunteers with human service agencies such as domestic violence centers and mental health facilities are already knowledgeable about trauma and trained to work with traumatized individuals. But many of those who will be part of the relocation and recovery process, such as administrative and maintenance staff or computer technicians, may not have had such training and will need to be briefed on the topic.

Information on indicators of trauma and how to best aid a traumatized person should be included as a component of the COOP orientation training and the disaster exercise scenarios. Periodic “refresher” training on this topic may also be necessary throughout the disaster recovery process, particularly as new volunteers come on board.

Three information sheets have been provided here as brief overviews of the topic: ***Stress or Trauma Indicators***, ***Children’s Reactions After a Disaster***, and ***How To Help***. These should serve as review material, rather than as a substitute for more extensive training.

Through recognition and monitoring of distress signals and by being supportive, we can facilitate the normal recovery process.

Additional Resources

- ★ For managing stress related to disasters & crises: International Critical Incident Stress Foundation, Inc., www.icisf.org/.
- ★ For information on helping children: *Helping Children Cope with Disaster*, FEMA & American Red Cross, <http://redcross.tallytown.com/library/HelpingChildrenCopeWithDisaster.pdf>.
- ★ For coping strategies after a hurricane: *Coping with Reactions to Hurricane Katrina & the Aftermath*, National Organization for Victims Assistance, <http://www.trynova.org/crisis/katrina/reactions-coping.html>.

STRESS OR TRAUMA INDICATORS

EMOTIONAL	BEHAVIORAL
<ul style="list-style-type: none"> <input type="checkbox"/> Apprehension, fear, panic <input type="checkbox"/> Guilt <input type="checkbox"/> Grief <input type="checkbox"/> Denial <input type="checkbox"/> Anxiety, agitation <input type="checkbox"/> Irritability <input type="checkbox"/> Depression <input type="checkbox"/> Intense anger <input type="checkbox"/> Emotional shock <input type="checkbox"/> Emotional outbursts or loss of emotional control <input type="checkbox"/> Feeling overwhelmed <input type="checkbox"/> Inappropriate emotional response 	<ul style="list-style-type: none"> <input type="checkbox"/> Withdrawal <input type="checkbox"/> Antisocial acts <input type="checkbox"/> Inability to rest <input type="checkbox"/> Intensified pacing <input type="checkbox"/> Erratic movements <input type="checkbox"/> Change in social activity <input type="checkbox"/> Change in speech patterns <input type="checkbox"/> Loss or increase of appetite <input type="checkbox"/> Hyper-alert to environment <input type="checkbox"/> Increased alcohol consumption <input type="checkbox"/> Change in usual communications
COGNITIVE	PHYSICAL*
<ul style="list-style-type: none"> <input type="checkbox"/> Confusion <input type="checkbox"/> Nightmares <input type="checkbox"/> Uncertainty <input type="checkbox"/> Hyper-vigilance <input type="checkbox"/> Suspiciousness <input type="checkbox"/> Intrusive images <input type="checkbox"/> Blaming someone <input type="checkbox"/> Poor problem-solving or decision-making <input type="checkbox"/> Poor abstract thinking <input type="checkbox"/> Poor attention, concentration or memory <input type="checkbox"/> Disorientation of time, place or person <input type="checkbox"/> Difficulty identifying objects or people <input type="checkbox"/> Heightened or lowered alertness <input type="checkbox"/> Increased or decreased awareness of surroundings 	<ul style="list-style-type: none"> <input type="checkbox"/> Thirst <input type="checkbox"/> Fatigue, weakness, fainting <input type="checkbox"/> Nausea, vomiting <input type="checkbox"/> Twitches <input type="checkbox"/> Dizziness <input type="checkbox"/> Chest pain <input type="checkbox"/> Headaches <input type="checkbox"/> Elevated blood pressure <input type="checkbox"/> Rapid heart rate <input type="checkbox"/> Muscle tremors <input type="checkbox"/> Shock symptoms <input type="checkbox"/> Grinding teeth <input type="checkbox"/> Visual difficulties <input type="checkbox"/> Profuse sweating or chills <input type="checkbox"/> Difficulty breathing

*** Any of these symptoms may indicate the need for medical evaluation. When in doubt, contact a physician.**
 (Adapted from *Critical Stress Information Sheets*, International Critical Incident Stress Foundation, Inc., 2001, www.icisf.org)

CHILDREN’S REACTIONS AFTER A DISASTER

The following signs of stress indicate a need for extra support. Remember to **compare** the behavior to the way the child behaved **prior to the event**. **If the abnormal behaviors persist for more than 3 weeks, please refer the child to a Mental Health Professional for help.**

PRE-SCHOOL & KINDERGARTEN
<ul style="list-style-type: none"> <input type="checkbox"/> Withdrawal, quiet, subdued, detached, mute <input type="checkbox"/> Denial, avoidance, ignoring, denial of facts & memories <input type="checkbox"/> Thematic play, re-enactment, ritualistic play of traumatic theme <input type="checkbox"/> Anxious attachment, clinging to parents & favorite objects, whining, tantrums, afraid of strangers <input type="checkbox"/> Fears of violence, new situations, strangers, confinement, certain objects <input type="checkbox"/> Regression to behavior they found successful at earlier developmental stages
SCHOOL-AGE CHILDREN
<p>Any of above behaviors plus:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Performance decline in school, intellectual, sports, hobbies <input type="checkbox"/> Compensatory behavior, deny, reverse facts, gain retribution through fantasy, play or interaction <input type="checkbox"/> Discrepancy of mood, inappropriate moods and feelings following incident <input type="checkbox"/> Behavior changes/problems, regressive behavior, attention-seeking behavior, getting into trouble <input type="checkbox"/> Psychosomatic complaints, stomach aches/upsets, headaches, bedwetting, nausea, rashes etc.
ADOLESCENTS
<p>Any of above behaviors plus:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Acting-out behaviors, isolation, truancy, drug/alcohol abuse, sexual activity, delinquency, running away, suicidal expression/attempts, self-destructive behavior <input type="checkbox"/> Low self-esteem & self-criticism, blame themselves, condemn own reactions to crisis, experiencing loss of control <input type="checkbox"/> “Too old, too fast,” develop life styles too advanced for their chronological age <input type="checkbox"/> Displaced anger onto inappropriate recipients <input type="checkbox"/> Pre-occupation with self is amplified, feels disconnected

(Adapted from *Children’s Reactions & Needs After Disaster*, International Critical Incident Stress Foundation, Inc., 2001, www.icisf.org)

HOW TO HELP

It is very common, in fact quite *normal*, for people to experience stress reactions or “emotional aftershocks” after a traumatic event. Emotional aftershocks may appear immediately afterwards or a short while later. Sometimes it may be weeks or months before stress reactions appear. Depending upon the severity of the event, the signs and symptoms of a stress reaction may last days, weeks, or longer. Support and understanding can help the stress reactions pass more quickly. Occasionally, a traumatic event is so painful that professional assistance is necessary. This does not imply craziness or weakness. It simply indicates that the particular event was just too powerful for a person to manage by him/herself.

TO HELP OTHERS

- Offer your assistance.
- Express your willingness to listen.
- Reassure person that s/he is safe and that reoccurring thoughts, frightening dreams or flashbacks are normal, will subside over time and become less painful.
- Urge person to maintain as normal a schedule as possible, get plenty of rest and exercise, and eat well-balanced, regular meals.
- Don't** tell a traumatized person that s/he is “lucky it wasn't worse” or not to be angry or upset. Instead, say you are sorry such an event has occurred and that you want to help.

TO HELP CHILDREN

- Reassure the children of their safety.
- Listen to what they have to say.
- Tell them how you are feeling.
- Allow the children to grieve and mourn.
- Validate the normalcy of their reaction.
- Keeping to their routine will convey security.
- Project calm. Children will look to adults to figure out how serious things are.
- Don't** lie. Tell them the facts (appropriate to their age). If you don't know an answer, say that.

TO HELP YOURSELF

- Get plenty of rest, exercise, and eat well-balanced, regular meals.
- Maintain as normal a schedule as possible; keep busy.
- Remind yourself that you're having a normal reaction to an abnormal situation; don't label yourself crazy.
- Give yourself permission to feel anxious, fearful or stressed and share your feelings with others.
- Make daily decisions that will give you a feeling of control over your life; avoid big, life-changing decisions.
- Don't** numb the pain with drugs or alcohol; a substance abuse problem will only complicate things.

(Adapted from *Critical Incident Stress Information Sheets*, International Critical Incident Stress Foundation, Inc., 2001, www.icisf.org)

TASK: TRAIN, TEST & PRACTICE

Training and testing mean engaging *everyone* in the process, not just those who are assigned to disaster planning and recovery teams or first responders. Regular, recurring tests of a continuity of operations plan will uncover its weaknesses and reveal gaps in resources, finances, supplies and staffing. Regular, on-going training will clarify the roles and responsibilities of management, staff and teams as well as improve coordination between your agency and the larger community. Practicing drills in advance of a major disaster reduces risks and lessens the damage that could be done to the agency's facilities, personnel, operations, and reputation.

Training Activities and **Training Scenarios** outline types of tests and drills and provide ideas for exercises. The **Training & Testing Worksheet** provides a way to annually track which type of training has been taken by whom.

Some additional considerations regarding disaster preparation and recovery include:

- ❑ Cross-train team members to ensure that functions can be restored with a reduced staff.

- ❑ Provide a brief "Refresher Course" for the Relocation Team as it arrives at the alternate facility.
- ❑ Provide post-disaster on-the-spot-job training for volunteers or staff not performing their regular duties.

Hold a debriefing session after each drill to identify "lessons learned" and changes to make to the COOP.

Additional Resources

- ★ For health-related agencies interested in disaster training or participating in local drills: Pinellas County Health Department, Office of Public Health Preparedness, 727-507-4857.
- ★ For information on community drills and outreach to local agencies: Pinellas Emergency Management, 727-464-3000.

TRAINING ACTIVITIES

ORIENTATION / OVERVIEW	TABLETOP EXERCISES	WALK-THROUGH DRILLS
<p>Overviews to address individual roles and responsibilities, notification and communication procedures, family disaster plans, evacuation and emergency response procedures, emergency shutdown procedures.</p> <p>Who: All personnel, community/media When: Quarterly</p>	<p>Simulated disaster scenarios with participants responding as though situation was actually happening; new information is presented throughout exercise. The scenarios developed during the Vulnerability Analysis can serve as the basis for tabletop exercises.</p> <p>Who: Management, Relocation Team, Recovery Team, Volunteer Coordination Team When: Annually</p>	<p>Participants perform their emergency response functions and assigned tasks. This activity is more thorough than a tabletop exercise.</p> <p>Who: Management, Relocation Team, Recovery Team, Volunteer Coordination Team When: Annually</p>
EVACUATION DRILLS	FUNCTIONAL DRILLS	FULL-SCALE DRILLS
<p>Walk the evacuation route to a designated area and test procedures for accounting for personnel. Participants are asked to make notes as they go along of what might become a hazard during an emergency, e.g., stairways cluttered with debris, smoke in the hallways. Plans are modified accordingly.</p> <p>Who: All personnel When: Quarterly</p>	<p>Tests of specific functions such as emergency notification, communication procedures, data recovery, etc., though not necessarily all at the same time. Participants evaluate the systems and identify problem areas.</p> <p>Who: All personnel When: See <i>Training & Testing Worksheet</i></p>	<p>A real-life emergency situation is simulated as closely as possible with all plans, systems and equipment fully implemented and with full deployment of all teams, partners, first responders, etc. This is a test of all participating organizations' total response capabilities and may take months to coordinate.</p> <p>Who: All personnel; community response organizations When: Annually</p>

TRAINING SCENARIOS

HISTORICAL	GEOGRAPHICAL	TECHNOLOGICAL
<p>Consider the types of emergencies that have occurred in the community, at this facility, or at other facilities in the area:</p> <ul style="list-style-type: none"> ▪ Fire ▪ Severe storms or tornadoes ▪ Hazardous material spills ▪ Transportation accidents ▪ Earthquakes ▪ Hurricanes ▪ Terrorism ▪ Utility outages ▪ Pandemic/disease outbreak 	<p>Consider the facility's location and its proximity to:</p> <ul style="list-style-type: none"> ▪ Flood plains, seismic faults or dams ▪ Companies that produce, store, use or transport hazardous materials ▪ Major transportation routes or airports ▪ Nuclear power plants 	<p>Consider what could result from a process or system failure:</p> <ul style="list-style-type: none"> ▪ Fire, explosion, hazardous materials incident ▪ Safety system failure ▪ Telecommunications failure ▪ Computer system failure ▪ Power failure ▪ Heating/cooling system failure ▪ Emergency notification system failure
HUMAN ERROR	PHYSICAL	CRITICAL TRAINING SCENARIOS
<p>Emergencies caused by employee error can result from:</p> <ul style="list-style-type: none"> ▪ Poor training ▪ Poor maintenance ▪ Carelessness ▪ Misconduct ▪ Substance abuse ▪ Fatigue 	<p>Consider the types of emergencies that could result from:</p> <ul style="list-style-type: none"> ▪ Physical construction or layout of the facility ▪ Hazardous processes or byproducts ▪ Facilities for storing combustibles ▪ Layout of equipment ▪ Poor or inadequate lighting ▪ Inaccessible or too few evacuation routes & exits ▪ Proximity of shelter areas 	<ol style="list-style-type: none"> 1. One or more offices/programs in the building are not functioning. Some contents & materials may be recoverable, some may not. 2. The entire building and all its contents are destroyed. 3. A temporary disruption of services occurs, e.g., power failure. 4. A disaster impacts a large geographic area with area uninhabitable for an unknown period of time.
ANALYZE EACH SCENARIO FROM BEGINNING TO END — WHAT COULD HAPPEN AS A RESULT OF:		
<ul style="list-style-type: none"> ▪ Prohibited access to the facility ▪ Loss of electric power ▪ Downed communication lines ▪ Ruptured gas mains 	<ul style="list-style-type: none"> ▪ Water damage ▪ Smoke damage ▪ Structural damage ▪ Air or water contamination 	<ul style="list-style-type: none"> ▪ Explosion ▪ Building collapse ▪ Trapped persons ▪ Chemical release

TRAINING & TESTING WORKSHEET

TYPE OF TRAINING	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
ORIENTATION / OVERVIEW												
Management												
Employees												
Community & Media												
TABLETOP EXERCISE												
Management												
Relocation Team												
Recovery Team												
Volunteer Coordination Team												
WALK-THROUGH DRILL												
Management												
Relocation Team												
Recovery Team												
Volunteer Coordination Team												
FUNCTIONAL DRILL												
Alert, notification & activation procedures (quarterly)												
Communication systems (quarterly)												
Vital records & databases (semi-annually)												
Information technology/cyber systems (semi-annually)												
Utilities at alternate site (annually)												
EVACUATION DRILL												
All personnel												
FULL-SCALE DRILL												
All personnel & community response organizations												

TASK: REVIEW & UPDATE THE COOP

A continuity of operations plan should be considered a “living document,” one that will evolve and be improved upon as new information and experience indicates. Websites, phone numbers and personnel can change so at the very least a regular update of contact information is necessary.

An annual audit of the entire COOP is strongly recommended. Among the issues to consider:

- Are all levels of management involved in evaluating and updating the COOP?
- Do all personnel and team members understand their respective responsibilities?
- Have new personnel been trained?
- Have team memberships changed?
- Are the names, titles and telephone numbers in the COOP current?
- Are Mutual Aid Agreements up to date? Should new ones be developed?
- Are photographs, video and other records of the facility and equipment up to date?
- Does the COOP reflect changes in the physical layout of the facility or new facility processes?
- Have the hazards in the facility changed?
- Have community agencies and organizations been briefed on the COOP? Are they involved in evaluating it?

- Are the problem areas and resource shortfalls identified in the Vulnerability Analysis being sufficiently addressed?
- Does the COOP reflect lessons learned from drills and actual events?

In addition to an annual audit, evaluate and modify the COOP at these times:

- After each training, drill or exercise
- After each emergency
- When personnel or their responsibilities change
- When the layout or design of the facility changes
- When policies or procedures change

Remember to brief all relevant parties on any changes to the COOP.

Additional Resources

- ★ For example of the outcome & recommendations from a recent local full-scale drill: *Totally Rad! Pinellas County Mass Casualty Drill*, March 22, 2006, Pinellas County Health Dept., www.pinellashealth.com/PHP/2006MassCasualtyDrillAR.pdf.

EARLY HURRICANE PREPAREDNESS CHECKLIST

MARCH

- Check disaster supplies; obtain needed items.
- Remind employees to review/prepare their Disaster Supplies and Personal Evacuation Kits.
- Inventory facility and equipment.
- Review insurance policies.
- Conduct some drills.
- Disseminate emergency preparedness information through agency newsletters, employee manuals, safety posters or other visible reminders.

APRIL & MAY

- Ensure facility is in good repair, e.g., loose roof shingles nailed down, overhanging tree limbs pruned.
- Inventory facility and equipment.
- Store copies of vital documents, back-up tapes, etc. in secure location in a non-evacuation zone.
- Ensure agreements with vendors and other agencies are in place.
- Conduct some drills.
- Ensure communications plan and emergency contact information is up to date.
- Disseminate emergency preparedness updates via e-mails.
- Check batteries of flashlights, radios, etc.

ADDITIONAL RESOURCES

- ★ *2007 Hurricane Guide Information*, Tampa Bay Regional Planning Council, www.tbrpc.org.
- ★ "2007 Hurricane Guide," *St. Petersburg Times*, tampabay.com (available through Nov. 30).
- ★ *Hurricane Handbook*, Pinellas County Emergency Management, www.pinellascounty.org/emergency/default.htm.
- ★ For a comprehensive on-line library of disaster preparedness & planning articles & checklists: American Red Cross, <http://redcross.tallytown.com/educate.html#004>.

AS THE STORM APPROACHES, TAKE EMERGENCY PROTECTIVE ACTION!

3-DAY NOTICE

- Clear property of items that could become airborne in high winds, e.g., trash cans, picnic tables.
- Back up computer files; ensure backup is stored in safe off-site location.
- Charge all laptops, cell phones, and other items with chargers.
- Obtain sufficient cash for emergency operations.
- Fill agency vehicles' gas tanks and check oil, water and tires.
- Ensure Grab & Go Kits for each essential function are up-to-date and ready to go.
- Verify Volunteer Coordination and Relocation Teams' availability and readiness.
- Verify skeleton staff available to be on-site if needed.
- Advise employees, customers, vendors and media of the activation of your COOP.

2-DAY NOTICE

- Close office in sufficient time for employees to prepare or evacuate.
- Remind employees of how & when to check in and that valid id to prove home address and employment may be needed to return to agency.
- Active alternate facility and move provisions.

24-HOUR NOTICE

- Cover, secure, or evacuate equipment and supplies.
- Lock and sandbag doors and windows.
- Raise computer and other equipment off the floor if flooding is expected.
- Shut off utilities and equipment including computers, major appliances and air conditioning.

TO MONITOR STORMS

- ★ National Hurricane Center: www.nhc.noaa.gov.
- ★ National Weather Service: Tampa Bay, <http://www.srh.noaa.gov/tbw/html/tbw/>.
- ★ The Weather Channel, www.weather.com/safeside/.
- ★ For continuous broadcast of weather conditions in Tampa Bay area: National Oceanic & Atmospheric Administration, frequency 162.550 MHz, <http://www.noaa.gov/>.

INITIAL DISASTER RECOVERY ACTIVITIES

ASSESS, RESTORE, REPAIR

- Be patient. Access to affected areas may be controlled. It will take time for search-and-rescue operations to be completed and hazards such as downed trees and power lines to be cleared. It may be weeks before utilities are restored.
- Stay tuned to local media for advice and instructions.
- Restore utilities carefully. If there has been flooding, an electrician should inspect the facility before turning on the power. Avoid fire or candles until it is certain there are no gas leaks.
- Use a generator only as instructed; do not connect portable generator to building wiring; place generator outdoors or in well-ventilated area.
- Assess and photograph/videotape physical damage. Keep all repair receipts for insurance and tax purposes.
- Meet with insurance agent(s).
- Hire only licensed contractors to do repairs; verify their licenses as well as the need for permits with the local Building Dept.
- Prepare facilities and equipment (e.g., clean up, perform temporary repairs).
- Analyze damage to agency operations.

ACTIVATE COMMUNICATIONS PLAN

- Active the agency phone tree or other procedure to account for all agency personnel.
- Notify **FEMA Operations Center, Pinellas County Emergency Management, and 2-1-1 Tampa Bay Cares, Inc.** of any agency closure, relocation, re-opening, change in hours of operation, status of building, status of services, etc. 2-1-1 will share the information with the Pinellas County Disaster Recovery Leadership Network in order to facilitate assistance to agencies.
- Send out a press release to local media. Include enews@211tampabay.org on your press release/media list.
- Establish communication with critical personnel and suppliers.

RESUME AGENCY OPERATIONS

- Establish "Reception Area" for deployed staff and spontaneous volunteers.
- Assign responsibilities to key staff.
- Augment staff if initial staffing is not adequate.
- Keep accurate records of emergency activities, expenditures, volunteers' hours and donations.

MASTER TASK LIST	<i>Date Reviewed</i>	<i>Location of Document or Supporting Resource</i>	<i>Staff Responsible</i>	<i>Notes</i>
FORM TEAMS				
1. Establish disaster teams & alternate members.				
2. Develop missions, timetables, budgets & tasks for each team.				
ANALYZE VULNERABILITIES				
1. Identify agency's vulnerabilities & disaster's potential impact on staff, customers, programs/services, property, equipment & resources.				
2. Estimate & budget for costs of disaster, including leasing temporary equipment, restoring lost data, hiring temporary workers.				
3. Inspect grounds & facilities (including alternate) for pre-emptive repairs & potential hazards, e.g., roof, siding, trees.				
PRIORITIZE ESSENTIAL FUNCTIONS				
1. List & prioritize essential functions.				
2. Identify staff & resource requirements for each essential function.				
REVIEW INSURANCE COVERAGE				
1. Identify what types you have, deductibles & limits on coverage.				
2. Identify needed coverage.				
3. Record/update insurance companies contact information.				

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ESTABLISH CHAIN OF COMMAND				
1. Establish lines of succession for leadership positions & limitations on authority.				
2. Establish policy for initiating & terminating chain of command.				
3. Maintain/update rosters of trained personnel with authority to perform essential functions.				
PARTNER FOR PREPAREDNESS				
1. Establish mutual aid agreements with local agencies.				
2. Schedule annual reviews & updates of mutual aid agreements.				
LOCATE ALTERNATE FACILITIES				
1. Identify alternate space & its evacuation zone.				
2. Identify equipment needed to sustain relocation & establishing communication.				
3. Ensure alternate facility can provide needed logistical support & infrastructure, e.g., utilities.				
4. Pre-position resources, equipment, & supplies (including food, water, office supplies).				

MASTER TASK LIST	<i>Date Reviewed</i>	<i>Location of Document or Supporting Resource</i>	<i>Staff Responsible</i>	<i>Notes</i>
DEVELOP COMMUNICATIONS PLANS				
1. Develop internal communications plan & compile/update contact info for personnel, volunteers, disaster teams.				
2. Develop external communications plan & compile/update contact info for partners, customers, vendors, contractors, media, insurance agents, emergency personnel.				
3. Designate a spokesperson.				
4. Establish agreements with communications vendors to quickly repair/replace damaged equipment.				
5. Stockpile equipment, e.g., walkie-talkies, cell/satellite phones.				
PREPARE & SUPPORT EMPLOYEES				
1. Compile/update employees' emergency contact info, availability & evacuation plans.				
2. Inform as to procedures for alerts, advisories & COOP plan activation.				
3. Encourage/support personal & family preparedness.				

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PROTECT VITAL RECORDS				
1. Identify vital documents, their location, & responsible staff.				
2. Backup vital documents (hard & electronic copies, multiple locations).				
3. Take video/photos of inventory, equipment, facilities & grounds.				
4. Establish policy on security of confidential or sensitive data in event of emergency relocation & reduced staff.				
5. Establish procedure for disaster teams to obtain account information & passwords.				
CONDUCT AN INVENTORY				
1. Inventory equipment, including serial & model numbers, description, costs, warranty/lease information.				
2. Compile receipts, lease agreements, warranties & instruction manuals.				
3. Schedule regular computer backup in alternate facility.				

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COLLECT DISASTER SUPPLIES				
1. Assemble Grab & Go Kits of vital records & data.				
2. Obtain/replenish first-aid kit.				
3. Stockpile food & water (minimum 3-day supply).				
4. Collect provisions & office supplies.				
5. Pre-arrange emergency provisioning contract with suppliers.				
TRAIN, TEST & PRACTICE				
1. Plan regular, recurring disaster plan reviews, exercises & drills for all personnel, community & media.				
2. Practice for a variety of emergency scenarios.				
REVIEW & UPDATE COOP				
1. Annually audit entire COOP.				
2. Update components as needed.				
POST-DISASTER				
1. Manage spontaneous volunteers.				
2. Cope with traumatized individuals.				

Additional Resources

★ *Continuity of Operations Self-Assessment Tool*, Federal Emergency Management Administration, www.fema.gov/government/coop/coopassessment3.shtm.

★ *Master Starting Points List*, <http://ypb.smtusa.com/resources/mastertasklist.asp>.

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Continuity of Operations Planning: A Step by Step Guide for Business, materials personally provided by W. Douglass, Manager of Planning & Preparedness, American Red Cross Tampa Bay Chapter, www.redcross.tbc.org.

Continuity of Operations Self-Assessment Tool, Federal Emergency Management Administration, www.fema.gov/government/coop/coopassessment3.shtm.

COOP for Smaller Community-Based Organizations Toolkit, Volunteer Florida, www.volunteerflorida.org.

COOP Plan Review Checklist, www.emergencymanagement.wi.gov.

Critical Stress Information Sheets, International Critical Incident Stress Foundation, Inc., 2001, www.icisf.org.

Emergency Management Guide for Business & Industry: A Step-By-Step Approach to Emergency Planning, Response & Recovery for Companies of All Sizes (FEMA 141), sponsored by a public-private partnership with the Federal Emergency Management Agency, October 1993, www.fema.gov/business/guide/index.shtm.

Emergency Preparedness & Business Continuity Plan Template, Nonprofit Leadership Center of Tampa Bay, www.nlctb.org.

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Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure & Good Intentions, National Voluntary Organizations Active in Disaster, <http://redcross.tallytown.com/library/ManagingSpontaneousVolunteersInTimesOfDisaster.pdf>.

Master Starting Points List, <http://ypb.smtusa.com/resources/mastertasklist.asp>.

Health & Human Services Disaster Recovery Leadership Network Operations Manual, Draft 02.08.07.

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They Will Come: Post-Disaster Volunteers & Local Governments, California Governor's Office of Emergency Services, <http://redcross.tallytown.com/library/TheyWillComePost-DisasterVolunteersAndLocalGovernments.pdf>.

Unaffiliated Volunteers in Response & Recovery, Florida Commission on Community Service, <http://redcross.tallytown.com/library/UnaffiliatedVolunteersInResponseAndRecovery.pdf>.