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*The Power of  
Knowledge and Leadership*



U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

# Seeing Businesses Through the Storm: The How-to's of Business Continuity Training





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# Introductions

Lynn Knight, Vice President, IEDC

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*Seeing Businesses Through the Storm Workshop – Caguas, Puerto Rico*



# Purpose of This Workshop

- ① Learn best practices in business continuity planning and disaster preparation
- ① Create a culture of preparedness in your community.
  - How to engage small to midsize businesses in business continuity
  - Practical advice on how to use your network
  - Holding an effective business continuity workshop
  - Instructions for delivering 'Open for Business' curriculum through an interactive format
- ① Discuss next steps for area

# Introduction of IEDC Team



- **Howard Pierpont** - *The Disaster Institute*
    - 30+ years Business Continuity & Resilience
    - Certified Business Continuity Planner (CBCP) - Disaster Recovery Institute International (US)
    - FEMA Reservist, National Disaster Recovery Framework, Community Recovery Assistance  
Chairman, International Association for Disaster Preparedness and Response
    - Director of International Programs. DERA Preparedness Institute
  - **Krystal Crockett** – *President/CEO, Bixby, Oklahoma Chamber of Commerce*
    - Located in “tornado alley,” the Chamber has pro-actively developed a business continuity workshop for local businesses and works to engage small businesses in preparedness activities.
    - “Achiever Under 40” by the Journal Record of Oklahoma in 2013
-



# IEDC Team cont.



- **Lynn Knight, CEcD** – *VP, Knowledge Management & Development, IEDC*
    - 25+ years in domestic and international business management and economic development.
    - Subject matter expert in tourism: 20+ years in resort and spa development and management; destination branding, master planning and product development
    - 2 x chairman of an economic development organization and President of the Saipan Chamber of Commerce, Northern Mariana Islands
    - Governor's Washington D.C. representative – Northern Marianas
  - **Carrie Mulcaire** - *Director of Federal Grants, IEDC*
    - 16 + years in local and regional economic development
    - Overseas technical assistance and federal grants on post-disaster economic recovery and preparedness.
    - Former Associate at Economics Research Associates (ERA) in Washington, D.C. Consultant on Asian Development Bank (ADB) technical assistance project in mainland China.
    - Masters in City and Regional Planning from UC Berkeley
-

# About IEDC



- ① 80+ years linking economic development professionals
  - ① World's largest professional organization for ED:
    - 4,500+ members
    - Network of 25,000+ professionals
  - ① IEDC Members include:
    - Public state, regional, city and county EDOs
    - Chambers of Commerce
    - Small business development
    - Technology development agencies
    - Redevelopment authorities
    - Educational Institutions & non-profits
    - Consultants
    - Utility companies
-

# About IEDC



## 🌐 Portfolio

- Four conferences annually
  - Training courses and webinars
  - Ongoing professional development & certification courses – CEcD
  - Accredited Economic Development Organization (AEDO) program
  - Economic Development Research Partners (EDRP) – think tank
  - Publications: Economic Development Journal, ED Now Newsletter
  - Legislative Monitoring
  - Technical assistance and applied research
-



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# Introducing IEDC's Disaster Recovery Work

Carrie Mulcaire, Director of Federal Grants, IEDC

# IEDC's Disaster Recovery Work



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- ① Volunteer Program for Gulf Coast Economic Recovery (Katrina)
- ① Technical Assistance – Capacity Building for Recovery
  - New Orleans, LA (2005 to Present)
  - Southeast Louisiana & Southwest Mississippi region from Katrina (2008- Present)
  - Cedar Rapids, Iowa from Floods (2008)
  - San Diego Wildfires (2007)
  - Galveston, TX from Hurricane Ike (2008)
  - Southeast Texas and Southwest Louisiana region from Hurricane Ike (2010 – Present)
  - Economic Recovery Assessments for 21 communities impacted by Oil Spill (2010)\
  - FY2011 Disaster Impacted Communities in U.S. Northeast, Southeast & Territories
- ① Training & Workshops
- ① Information Dissemination of Best Practices



# Expertise

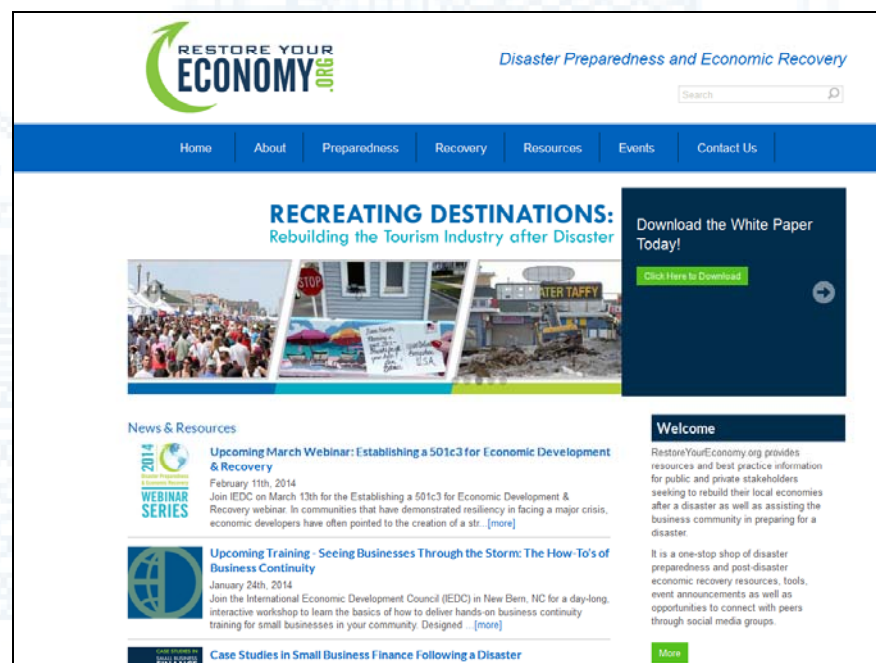
- ④ Economic Recovery Assessments
  - ④ Organizational Management & Capacity Building
  - ④ Entrepreneurship & Small Business Assistance
  - ④ Business Retention Following a Major Disaster
  - ④ Marketing & Community Branding
  - ④ Neighborhood Redevelopment
-



④ Practical guidance and tools to assist in disaster preparedness and post-disaster economic recovery

④ One-stop shop for:

- Best practices
- Reports & publications
- Case studies
- Tools
- Event announcements
- Links to assistance
- Social media



## Disaster Preparedness & Economic Recovery

# 2014 | WEBINAR SERIES



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- MAY 28th - Asset Mapping and Data Collection Before a Crisis
  - JUNE - Using the National Emergency Grant (NEG) for Recovery
  - JULY - Addressing Blight in Disaster-Impacted Neighborhoods
  - AUGUST – Fundraising Strategies for Economic Transformation
  - SEPT – Navigating Federal Resources for Long-term Recovery in Rural Communities
  - OCTOBER – Creating Successful Partnerships with the Private Sector
  - NOVEMBER – How to Write a Winning Grant Application
  - DECEMBER - ‘Open for Business’: Crisis Communication
-



# Leadership in Times of **CRISIS**

**A Toolkit for Economic Recovery and Resiliency**

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# About the Toolkit

- ① A guide to help economies recover post-disaster with:
    - Resources, checklists
    - How-to's, best practices
    - Real world case examples
  - ② Designed to benefit public and private sector officials:
    - Economic development organizations (EDOs)
    - Chambers of Commerce
    - Business leaders
    - Small business development centers (SBDC)
    - Community colleges and business schools
    - Community development financing institutions (CDFIs)
-



# Toolkit Chapters

- ① Introduction & Disaster Overview
  - ① Disaster Preparation Measures
  - ① Small Business Assistance
  - ① Business Retention and Expansion Before and After a Disaster
  - ① Assessing the Economic Impacts of a Major Disaster
  - ① Crisis Communications
  - ① Navigating the Federal System of Disaster Assistance Programs
  - ① Strategic Planning for Disaster Recovery Economic
  - ① Diversification after a Disaster
-



# Toolkit Highlights

- ① How to deal with overwhelming communication issues
- ① Assessing the damage on businesses & economy
- ① Retention of businesses from large to small
- ① Navigating the federal system & issues with lack of federal aid
- ① Redevelopment challenges in blighted areas





Download for free at [RestoreYourEconomy.org](https://RestoreYourEconomy.org)

# Assisting FY2011 Disaster-Impacted Communities

- ① Grant from the EDA Philadelphia Office
  - ① Partnership with National Association of Development Organizations (NADO)
  - ① Grant Components include
    - Needs Assessment
    - Customized Technical Assistance for Select Communities
    - Training workshops, webinars, and mentoring
    - Research to disseminate best practices
-

# Assisting FY2011 Disaster-Impacted Communities

- ④ Recipients of IEDC's assistance
    - Communities that received a presidential-disaster declaration between Oct 1, 2010 to Sept 30, 2011.
  - ④ Bring economic recovery peers together to:
    - Share experiences
    - Effective practices
    - Provide support in terms of resources, ideas, and strategies.
-



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# Overview & Expectations

Lynn Knight, Vice President, IEDC

# Review Today's Agenda

- ① Why Plan? Engaging Small Businesses in Business Continuity
  - ① Roundtable Discussion – Sharing Experiences in Business Recovery
  - ① Creating an “Open for Business” Culture
  - ① How to Develop an Effective Program to Engage Local Businesses
  - ① How to Market & Successfully Recruit Local Businesses
  - ① Preparedness for Economic Development Organizations & Chambers
  - ① Testing the Plan & Other Follow-up
  - ① Possible Next Steps & Wrap up
-



# Your Expectations?





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# **Why Plan? Engaging Small Businesses in Business Continuity**

Howard Pierpont, Certified Business Continuity Coach

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# **WHY SHOULD WE MAKE A PLAN?**



# Common Objections

- I don't have the time
  - It doesn't contribute to the top/bottom line
- 
- That's IT's job
  - We don't need that in our department
  - I don't have the budget
  - That'll never happen!!!



# Business Continuity Objectives

- Protect people
- Secure and protect property and contents
- Minimize downtime
- Resume business operations
- Contractual obligations
- Preserve reputation



# Blind Spots

- IT centric
- Lack of Senior Management support
- Poor buy-in throughout the Enterprise
- Who are you talking to
- What language are you using
- Narrow focus
- Incomplete Risk and Hazard Assessments
- Missing interdependencies



# Incident Management

- Department or site incident management
- Shared department or site management
- Plan consistent with local and industry standards
- Existence of:
  - Knowledge expert and qualified incident manager
  - Notification lists and procedures
  - Designated location for managing incident





# Security Management

- Security of:
  - People
  - Facilities
  - Information
- Protecting targeted or impacted:
  - Information
  - Personnel
  - Resources



# Business Recovery

- Ensure that all “critical functions” are recovered within defined timelines
- Includes all tangible and intangible items:
  - IT applications
  - Intellectual property
  - Skill sets and expertise
  - Others



# Infrastructure Recovery

- Includes all items and areas that “critical processes” depend on:
  - Phones – Workspace – Seating / Meeting
  - Heat – Power – Water
  - Process control equipment
  - Specialized HVAC
  - Business Basics



# Incident Management

- Activation and Escalation of initial response that may lead to a larger response

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- All aspects of
  - Emergency Response
  - Crisis Management
  - Control and Command
  - Communications



# What if?

- A disaster of any size; human caused, natural, technological or physical building impacts your organization.
- Could you:
  - Contact your employees, vendors, customers?
  - Replace equipment?
  - Replace critical or confidential data?
  - Protect reputation / market share?



# Risks to Businesses

- Power loss or loss of use of the facility
- Loss of Sales / Customer defection
- Length of time to recover
- Lack of sufficient insurance coverage:
  - Business Interruption Insurance
  - Property and Casualty



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# **Why EDOs / Chambers should be Concerned about Small Business Preparedness?**

Krystal Crockett, President & CEO  
Bixby Chamber of Commerce





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# Break



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# Roundtable Discussion – Sharing Experiences in Business Recovery

Howard Pierpont, Certified Business Continuity Coach,  
The Disaster Institute

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## In the next few minutes

- Pick a scribe
  - Prepare presentation sheet
  - Pick a spokesperson
- 
- Discuss and report disaster experience:
    - Island / Regional disaster
    - Community disaster
    - Your neighborhood
    - Your business



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# Creating an “Open for Business” Culture

Howard Pierpont, Certified Business Continuity Coach,  
The Disaster Institute



# **HOW TO BUILD A PLAN & WHAT TO CONSIDER**



# Business Continuity Steps

- Know your:
  - Risks
  - Operations
  - Employees
  - Key customers, contacts, suppliers & vendors
  - Finances
- Know when to update your plan
- Know when and how often to test plan
- Know where to go for help



# Know Your Risks



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OF THIS FORM

## Know Your Risks

Use this form to review potential threats. Fill in one field for probability and one field for severity.  
Finally, multiply the probability and severity levels and enter the total in the total value column.

THREATS	Probability (0-5)	Severity (0-5)	Total
Earthquake			
Tornado/Wind/Hurricane			
Flood			
Severe Winter Weather			
Interior Fire			
Wildfire			
Loss/Illness of Key Staff			
Workplace Violence			
Software/Hardware Failure			
Power Outage			
Loss of Utilities (water, gas, electricity, etc.)			
Pandemic/Epidemic/Flu			
Loss of Premises			
Other			
Other			
Other			
Other			
Other			
Other			

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Download this document at <https://www.iihs.com/open-for-business>





# Know Your Operations



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## Know Your Operations

Use this form to identify what business functions are critical to your business' survival. Duplicate the form for each business function.

Updated: \_\_\_\_\_

Next Review Date: \_\_\_\_\_

### BUSINESS FUNCTION:

Priority: ☐ Extremely High ☐ High ☐ Medium ☐ Low

Employee in charge: \_\_\_\_\_

Timeframe or deadline: \_\_\_\_\_

Money lost (or fines imposed) if not done: \_\_\_\_\_

Obligation: ☐ None ☐ Legal ☐ Contractual ☐ Regulatory ☐ Financial

Who performs this function? (List all that apply)

Employees: \_\_\_\_\_

Suppliers/vendors: \_\_\_\_\_

Key contacts: \_\_\_\_\_

(For additional space, use the Notes area below)

Who helps perform this function? (List all that apply)

Employees: \_\_\_\_\_

Suppliers/vendors: \_\_\_\_\_

Key contacts: \_\_\_\_\_

(For additional space, use the Notes area below)

What is needed to perform this function? (List all that apply)

Equipment: \_\_\_\_\_

Special Reports/Supplies: \_\_\_\_\_

Dependencies: \_\_\_\_\_

(For additional space, use the Notes area below)

Who uses the output from this function? (List all that apply)

Employees: \_\_\_\_\_

Suppliers/Vendors: \_\_\_\_\_

Key Contacts: \_\_\_\_\_

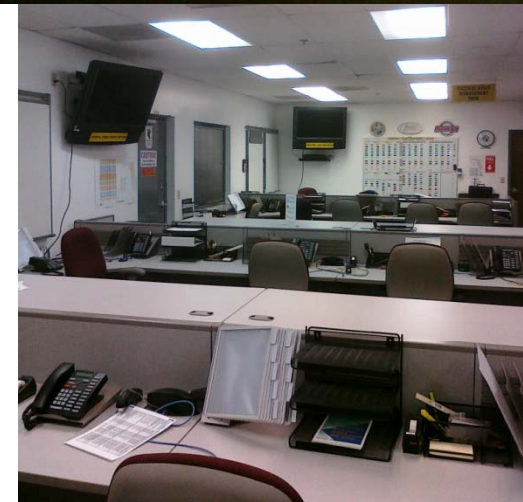
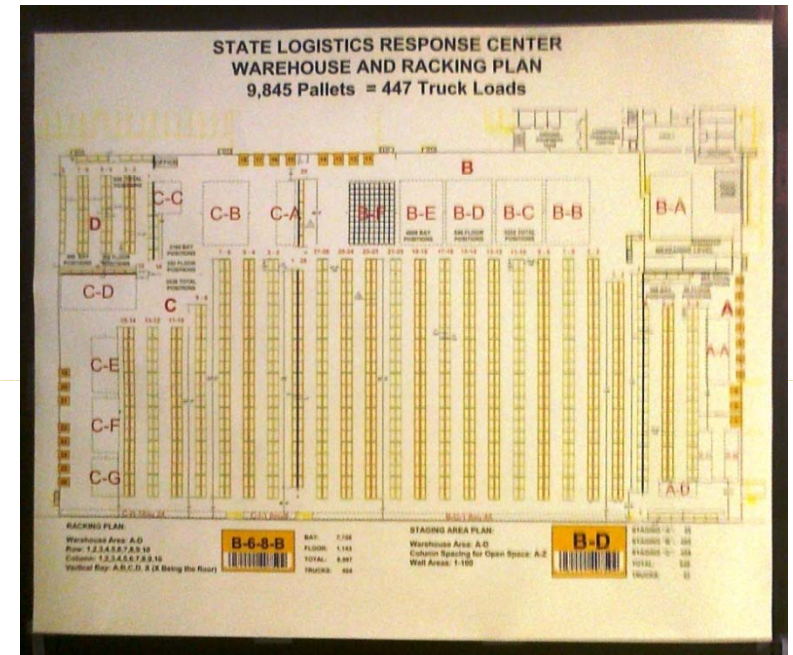
(For additional space, use the Notes area below)

Brief description of how to complete this function:

Workaround methods:

Notes:

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# Know Your Employees



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## Know Your Employees

Use this form to record information about all employees, including the business owner so that each person can be contacted at any time. Duplicate the form for each employee.

Updated: \_\_\_\_\_

Next Review Date: \_\_\_\_\_

### EMPLOYEE NAME:

Position/title: \_\_\_\_\_

Home address: \_\_\_\_\_

City, State, ZIP: \_\_\_\_\_

Office phone: \_\_\_\_\_

Ext. \_\_\_\_\_

Alternate phone: \_\_\_\_\_

Home phone: \_\_\_\_\_

Mobile phone: \_\_\_\_\_

Office e-mail: \_\_\_\_\_

Home e-mail: \_\_\_\_\_

Special needs: \_\_\_\_\_

### Certifications:

☐ First Aid ☐ Emergency Medical Technician (EMT) ☐ CPR ☐ Ham Radio

☐ Other: \_\_\_\_\_

☐ Special licenses: \_\_\_\_\_

### Local Emergency Contact

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Home phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

### Out of State Emergency Contact

Full name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Home phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

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# Are Your Employees Prepared

- Do they know there is a plan?
- Do they know where the plan is?
- Do they know their role [real or potential]?
- Do you include plan education as part of the new hire process?
- Can some work from home?
- Do they have a plan for home?

# Communication Plan

- Call tree for notification:
  - Employees
  - Customers / Contacts
  - Suppliers / Vendors
- Who speaks for the business to media.
- Social media – submission and review
- Central phone numbers – portable
- Crowd control at impacted site





# Know Your Key Customers, Contacts, Suppliers and Vendors



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## Know Your Key Customers, Contacts, Suppliers and Vendors

Use this form to record information about your current suppliers, those you could use as an alternate choice and your key customers and contacts. Duplicate the form for each contact.

Updated: \_\_\_\_\_

Next Review Date: \_\_\_\_\_

### CONTACT TYPE:

☐ Current Supplier/Vendor ☐ Back-Up Supplier/Vendor ☐ Key Customer/Contact

### Company /Individual Name:

Account Number: \_\_\_\_\_

Materials/Service Provided: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Company Phone: \_\_\_\_\_

Website: \_\_\_\_\_

### Company Representative

Primary Contact: \_\_\_\_\_

Title: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Alternate Contact: \_\_\_\_\_

Title: \_\_\_\_\_

Office Phone: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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# Additional Considerations

- Emergency Supplies – Employees/Business
- Meeting location / Rally Point(s)
- Alternate Location
- Insurance Coverage:
  - Preparedness coverage
  - Business Interruption / Extra Expense
  - Supply Chain
  - Off Premises Power Loss / Service Interrupt
  - Interruption by Civil or Military authority

# Communication & Relocation







# What if a Supplier or a Customer Has A Disaster?

- Do they have plans?
  - Ask about recovery plans.
  - Have they tested the plans?
  - Are there additional potential alternate sources?
  - Can you insure against loss?
- 
- What if a customer can't take your product / service?

# Know Your Information Technology



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## Know Your Information Technology

Use this form to list the computer equipment, hardware and software, vital records and your back up processes that you will need to fulfill your critical business functions. Duplicate the form for each item or record.

Updated: \_\_\_\_\_

Next Review Date: \_\_\_\_\_

### TYPE:

☐ Computer Equipment/Hardware ☐ Computer Software ☐ Vital Records

### Item:

Title and Version/Model Number: \_\_\_\_\_

Serial/Custom Number: \_\_\_\_\_

Registered User Name: \_\_\_\_\_

Purchase/Lease Price: \$ \_\_\_\_\_

Purchase/Lease Date: \_\_\_\_\_

Quantity (equipment) or Number of Licenses (software): \_\_\_\_\_

License Numbers: \_\_\_\_\_

Technical Support Number: \_\_\_\_\_

Primary Supplier/Vendor: \_\_\_\_\_

Alternate Supplier/Vendor: \_\_\_\_\_

Notes: \_\_\_\_\_

### Name of vital record:

Name of Business Function Vital Record Supports: \_\_\_\_\_

Type of Media: \_\_\_\_\_

Is It Backed Up? \_\_\_\_\_

How Often is it Backed Up? \_\_\_\_\_

Type of Media for Backup: \_\_\_\_\_

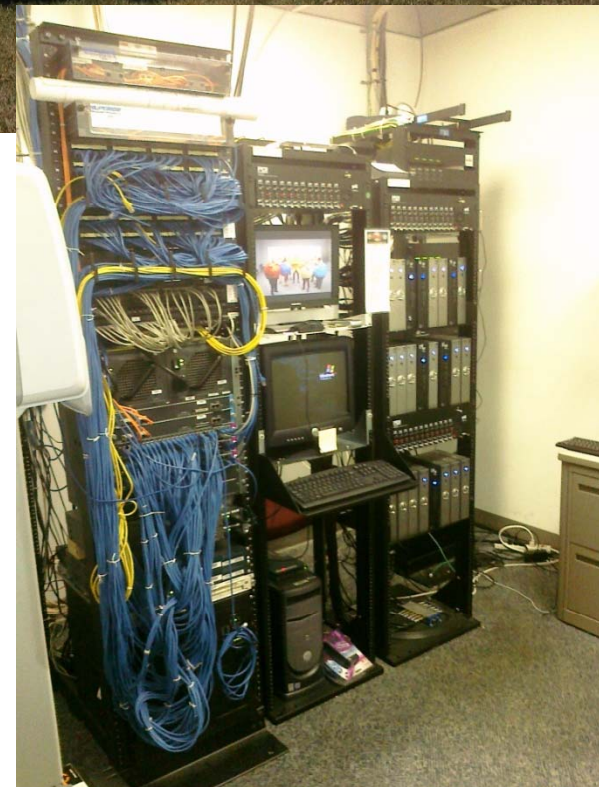
Where is it Stored? \_\_\_\_\_

Can the Record be Recreated? \_\_\_\_\_

Notes: \_\_\_\_\_

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# Know Your Finances



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## Know Your Finances

Use this checklist to consider and plan for your business' financial needs in the event of a disruption.

Updated: \_\_\_\_\_

Next Review Date: \_\_\_\_\_

### Overall Business Needs

Have you worked with your bank to set up a line of credit for your company?

Who is responsible to activate it and who has access to it? \_\_\_\_\_

How much cash would be needed to survive a 3-day, 5-day, 10-day, or longer shutdown?

For what purpose is the cash needed? \_\_\_\_\_

Will you have that cash on hand? \_\_\_\_\_

Who would make the decision to utilize the cash? \_\_\_\_\_

Who would have access to the cash? \_\_\_\_\_

Do you have sufficient cash to pay for various additional services that might be needed, such as janitorial or security services?

Do you have a company credit card that could be used for emergency purchases?

Who is authorized to use the credit card? \_\_\_\_\_

Will you be able to pay your bills/accounts payable?

Do you have procedures in place to accommodate a business disruption? \_\_\_\_\_

Will you be able to continue to accept payments from customers/accounts receivable?

Do you have procedures in place to accommodate a business disruption? \_\_\_\_\_

Have you identified an alternate location where you can work?

### Human Resources

In the event of a widespread disaster, how will payroll be handled?

If your business is forced to shut down temporarily, will some or all employees continue to be paid?

For how long? \_\_\_\_\_

Will they be able to use their sick and/or vacation time without restriction? \_\_\_\_\_

Are there union considerations? \_\_\_\_\_

Have your employees been made aware of your policies that will be in place during a disruption? \_\_\_\_\_

If banks are closed, will your business provide payroll-cashing services?

What is your business' policy on cash advances, check cashing, and employee loans? \_\_\_\_\_

Will your employees be expected to work overtime? \_\_\_\_\_

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This financial crisis is forcing companies to make tough decisions;  
there is a risk that we might need to lay off André....





# Know When to Update Your Plan



**THE EASY WAY TO PREPARE YOUR BUSINESS FOR THE UNEXPECTED.**

## Know When to Update Your Plan

For your plan to be successful when a business disruption occurs, it needs to be continually maintained and updated. One effective way to do this is to include business continuity planning anytime there are changes in your business or your location – basically, in every business decision you make. Keep your employees up-to-date with any plan changes as this will help when they need to put the plan into action, which in turn will reduce the negative impact to your business.

**Maintenance is fairly straightforward. Repeat the following process every six months:**

- Have your employees review the plan.
- Is anything out of date?
- Has all contact information been verified and updated?
- Have your procedures changed?
- Have there been any changes in business priorities?
- Have responsibilities changed?
- Document any changes.

Finally, test your plan and conduct exercises with your key employees. Until you test your plan for vulnerabilities you may not see where the gaps are in keeping your business going during a disruption. No plan or set of documents should remain sitting on a shelf.

Conducting exercises or drills are effective ways to test your plan, engage employees and train them. The following pages include an exercise that deals with a power outage. Once you learn the basics of conducting an exercise, you can easily generate your own scenario.

Another option to test your plan is to pose this scenario to employees at the end of a staff meeting: "If the alarm in this building were to go off, we would exit the building. Once outside we are told that we cannot go back into the building for one week. What would you do? How would you continue to work?" This will get people thinking about the possibilities and get them on board with your program. You may be surprised at your employees' increased level of growth and maturity when it comes to making the correct decisions following a disaster. This type of exercise can also be a great team building activity.

### About the Form

Disaster exercises provide opportunities for you to: test company disaster readiness; train employees through practice; improve employees' ability to make informed decisions when responding to an emergency; identify what needs to be done during and after a disaster; and examine a specific scenario or situation more closely.

Gather your team, key employees and anyone else who would benefit from the exercise, present the power outage scenario, and begin the discussion with the questions provided. This can be done informally, such as during lunch or as part of a staff meeting.

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# Know Where to Go For Help



**THE EASY WAY TO PREPARE YOUR  
BUSINESS FOR THE UNEXPECTED.**

## Know Where To Go for Help

Your relationship with your community and outside agencies can strengthen your ability to protect your employees and property and return to normal operations. Maintain a channel of communication with community leaders, public safety organizations such as the police, fire and emergency medical services, government agencies, utility companies, and others. Working together with outside agencies can be beneficial because they can provide a wealth of information to help you recover quickly from a disaster.

Refer to the resources below for more information about implementing disaster safety recommendations to help you prepare for and recover from natural or other types of disasters.

### Insurance Institute for Business & Home Safety

In addition to providing this free business continuity tool kit, IBHS provides free disaster preparedness and property protection guidelines, recommendations and projects for small businesses. The Institute also offers post-disaster recommendations on repairing and rebuilding to make your building(s) stronger and safer the next time a disaster strikes.

<http://disastersafety.org>

### American Red Cross

Among other disaster preparedness and response services, the Red Cross offers a number of preparedness training programs and resources for workplaces, families, and individuals.

[www.redcross.org](http://www.redcross.org)

### Business Civic Leadership Center – Disaster Help Desk

The BCLC Help Desk is designed to enhance community economic recovery after a disaster. The Help Desk provides on-the-ground coordination of information among businesses, local chambers of commerce, NGOs, government responders, and disaster recovery specialists.

<http://bclc.uschamber.com/site-page/disaster-help-desk-business>

### DisasterAssistance.gov

Provides information on how you might be able to get help from the federal government before, during and after a disaster. If the President of the United States makes help available to individuals in your community after a disaster, you can visit this site to apply online.

<http://www.disasterassistance.gov>

### Federal and Local Emergency Management Agencies

Even the largest, most widespread disasters require a local response. Local emergency management programs are the core of the nation's emergency management system.

<http://www.fema.gov/regional-operations/state-offices-and-agencies-emergency-management>

### Internal Revenue Service–Disaster Assistance and Emergency Relief for Businesses

The IRS offers audio presentations about planning for disaster. These presentations discuss business continuity planning, insurance coverage, record keeping and other recommendations for staying in business after a major disaster.

<http://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/Disaster-Assistance-and-Emergency-Relief-for-Individuals-and-Businesses-1>

### Small Business Administration

The U.S. Small Business Administration provides loans, loan guarantees, contracts, counseling sessions and other forms of assistance to small businesses following a disaster.

<http://www.sba.gov/>  
<http://www.sbaonline.sba.gov/services/disasterassistance/disasterpreparedness/>

### Small Business Development Centers

The SBDC assists small businesses with financial, marketing, production, organization, engineering and technical problems, as well as feasibility studies.

<http://www.sba.gov/content/small-business-development-centers-sbdc>  
<http://www.asbdc-us.org/>

- [www.pr.gov](http://www.pr.gov)
- [restoreyoureconomy.org](http://restoreyoureconomy.org)
- [www.ready.gov](http://www.ready.gov)
- [www.ready.gov/es](http://www.ready.gov/es)
- [www.sba.gov](http://www.sba.gov)
- [www.preparemybusiness.org](http://www.preparemybusiness.org)
- [www.readyrating.org](http://www.readyrating.org)
- [www.disastersafety.org](http://www.disastersafety.org)
- [www.fema.gov](http://www.fema.gov)

OFB-EZ is a program of the Insurance Institute for Business & Home Safety  
Download this document at [DisasterSafety.org/open-for-business](http://DisasterSafety.org/open-for-business)

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# Review Business Continuity Steps

- Know your:
  - Risks
  - Operations
  - Employees
  - Key customers, contacts, suppliers & vendors
  - Finances
- Know when to update your plan
- Know when and how often to test plan
- Know where to go for help



# About the Presenter

- Howard Pierpont
- Board Chairman - International Association for Disaster Preparedness and Response (DERA)
- Director of International Studies for the DERA Preparedness Institute
- [Howard.Pierpont@Disasters.Org](mailto:Howard.Pierpont@Disasters.Org)





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# **How to Develop an Effective Program to Engage Local Businesses**

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# Top Ten Ways to Engage Small Businesses in Preparedness

Carrie Mulcaire, Director of Federal Grants  
IEDC

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# Top Ten Ways to Engage Local Businesses in Disaster Preparedness Activities



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## 1) Partner with Business & Trade Groups to Access Their Networks

- Benefits of engaging local chamber
- Provide administrative and marketing support

## 2) Develop a network of business continuity professionals to connect with local businesses

- Work with related professional associations, such as Disaster Recovery Institute International (DRII)

Source: Scott Cave of Atlantic Business Continuity Services

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# Top Ten Ways to Engage Local Businesses in Disaster Preparedness Activities cont.

## 3) Identify storytellers of disaster-impacted businesses to motivate others

- Personal experiences are powerful
- Learn from others

## 4) Create speaker's series to deliver on-going messages

- Provides the reasons why businesses should care

Source: Scott Cave of Atlantic Business Continuity Services

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# Top Ten Ways to Engage Local Businesses in Disaster Preparedness Activities cont.

## 5) Deliver workshops on business continuity content

- Instruct on the how-to's and provide peer-related testimonials
- Provide free and user-friendly resources
- Convenient Time and Location & advertise through professional groups

## 6) Engage emergency managers in business continuity training events

- Businesses need to know local gov't response
- Builds community-wide resiliency

Source: Scott Cave of Atlantic Business Continuity Services

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# Top Ten Ways to Engage Local Businesses in Disaster Preparedness Activities cont.

## 7) Publicize activities through local channels

- Local media channels, social media, and utility bills

## 8) Promote key activities through the city's business license renewals

- Inserts in new license applications & license renewals

Source: Scott Cave of Atlantic Business Continuity Services

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# Top Ten Ways to Engage Local Businesses in Disaster Preparedness Activities cont.



## 9) Promote activities through fire inspections

- Pass out flyers and adding item to the fire chief's checklist

## 10) Track the progress of efforts

- Use surveys, business visits, etc. to measure results
- Track % of businesses with a plan
- Track over time period

Source: Scott Cave of Atlantic Business Continuity Services

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# Ways to Engage Chambers of Commerce & EDOs



- Develop a Plan for the Chamber
- Present Small Business Continuity Planning to the largest potential audience
- Have the Chamber Endorse the process
- “Sell” Business Continuity Training and as a Value-added service for the Chamber
- Provide the Training and Assistance
- Imbed Business Continuity into the Chamber Processes

**TULSA METRO CHAMBER**



**THE STATE CHAMBER OF OKLAHOMA**  
LEGISLATIVE ADVOCATES FOR BUSINESS



**BROKEN ARROW**  
Where opportunity lives

Broken Arrow Economic Development Corporation  
Broken Arrow Area Chamber of Commerce

Source: Bonne Canal, The Resiliency Institute

**Charleston Metro  
Chamber of Commerce**





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# Case: Bixby Metro Chamber of Commerce


Krystal Crockett, President & CEO,  
Bixby Chamber of Commerce

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# How to Develop an Effective Program to Engage Local Businesses

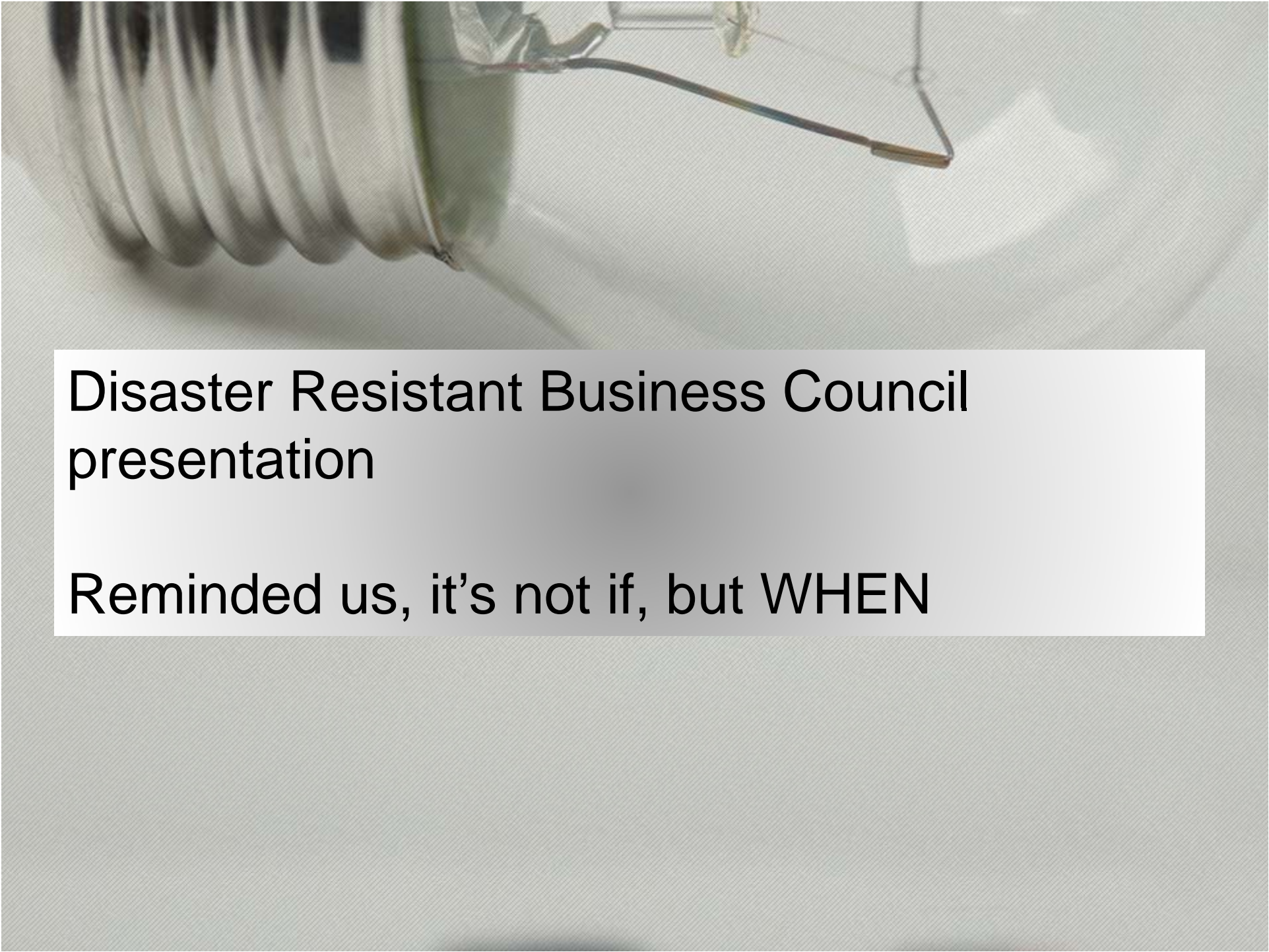
Case Study



A close-up photograph of a lightbulb with a spiral filament. A pair of glasses is resting on the bulb, with one lens positioned over the filament. The background is a plain, light-colored surface.


## Where the Idea Came From



A close-up photograph of a spiral-bound notebook with a pair of glasses resting on it. The notebook's spiral binding is visible on the left side. The glasses have thin, dark frames and are positioned diagonally across the upper right portion of the frame. The background is a light-colored, textured surface, possibly a desk or table.

## Disaster Resistant Business Council presentation


Reminded us, it's not if, but **WHEN**

A close-up photograph of a spiral-bound notebook with a pair of glasses resting on it. The notebook's spiral binding is visible on the left, and the glasses are positioned in the upper right. The background is a light, textured surface.

Our area has had it all - terrorist attack, tornadoes, floods, droughts, wildfires, blizzards, ice storms, and earthquakes.

Memories fade over time





## How We Created Our Seminar



Asked the question –

Why is it important to have a plan?

We developed a plan based on our community and our strengths as a Chamber



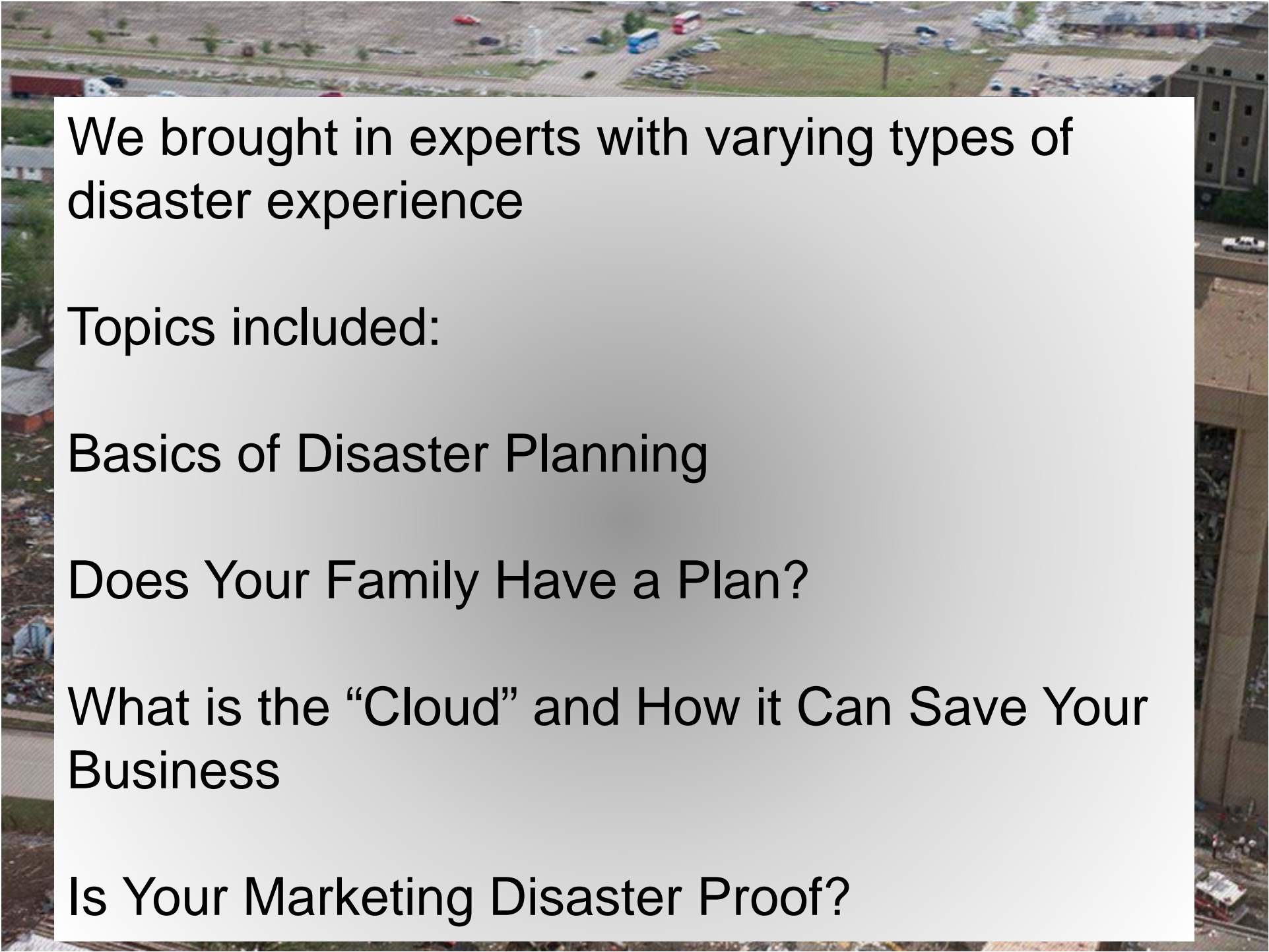
An aerial photograph showing the aftermath of the Moore Tornado. The image captures a large area of destruction, with numerous houses and commercial buildings reduced to rubble. Debris is scattered across the landscape, and a large pile of wreckage is visible in the foreground. Several emergency vehicles, including fire trucks and ambulances, are present, indicating ongoing rescue and recovery efforts. The scene is a stark illustration of the power of a tornado.

# Moore Tornado

Speakers/  
Topics

# OKC Bombing





We brought in experts with varying types of disaster experience

Topics included:

Basics of Disaster Planning

Does Your Family Have a Plan?

What is the “Cloud” and How it Can Save Your Business

Is Your Marketing Disaster Proof?





When choosing speakers:

Who in your organization has a story?

Mix experts and those that have lived it

The best speakers can come from the  
unlikeliest places



A wide-angle photograph of a large group of people, mostly men in business attire, seated at round tables covered with black tablecloths in a large, ornate banquet hall. The room features a high ceiling with recessed lighting and decorative pendant lights. In the foreground, a man in a dark suit is seated with his back to the camera, looking towards the center of the room. To his right, another man in a grey suit is also seated with his back to the camera. Further back, a man in a dark suit is seated at a table, looking down at something in his hands. The tables are set with glasses, plates, and napkins. A sign on one of the tables in the background reads "BUSINESS MEETINGS". The overall atmosphere is formal and professional.

## Who Was In The Room





Banks

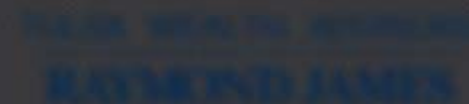
Utility Companies

Disaster Restoration Companies

Small Businesses

Many companies also invited their clients, vendors, and partners – do not limit to just your circle!

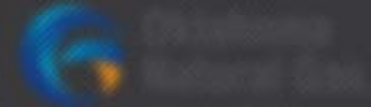
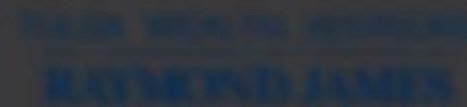
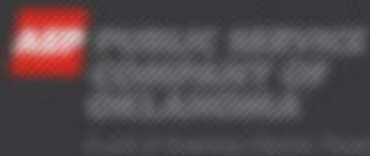
## Sponsorship Opportunities





Sponsorship opportunities offered:  
Presenting Sponsor  
Booths

Individual tickets sold – included lunch  
and three hour seminar







## How Often to Hold Event



The background of the slide is a close-up photograph of a document. It features several horizontal dotted lines. Handwritten in blue ink, the text '17 FR' is visible at the top, and '18 SA' is written below it, enclosed within a hand-drawn red circle. The overall image has a slightly grainy, textured appearance.

Recommend – every 2-3 years

Reduce overlap

Work together if possible

Remember - Every community is different

A woman with dark hair, wearing a light blue shirt, is shown in profile, shouting into a large red and white megaphone. She is holding the handle of the megaphone with her right hand. The background is a plain, light-colored wall.

Follow Up/  
Encourage



A woman with dark hair, wearing a light blue shirt, is shown in profile from the chest up. She is holding a red megaphone to her mouth and speaking. The background is a plain, light-colored wall. A white rectangular box with black text is overlaid on the image.

Any time you can remind people – DO IT!

Learning is a process, not an event

Use the news to your advantage



May 20, 2013

## Dear Chamber Partner,

Last night's storms were an unwelcome reminder of what can happen at any time. The Bixby Metro Chamber would like to extend our thoughts and prayers to everyone affected by the severe weather. We also want to make sure that in the event of storms like the ones last night, our businesses are prepared.

Every year the changing seasons bring on severe weather. In Oklahoma we can get large and frequent hail, straight line winds, and tornadoes, every spring. In 2011 alone, we had tornadoes, flooding, blizzards, record heat, a drought, and earthquakes.

The Bixby Metro Chamber is dedicated to ensuring that in the event of a disaster, we will be capable of continuing operations in order to help you get back to business. We have compiled our own business continuation plan, and have updated it to make sure it fits not only our needs, but that of the business community.

In the event of an emergency, the Chamber has the ability to relocate offices and be up and running to serve our Partners within 72 hours. This has been made possible by partnerships with BTC Broadband, Bixby Public Schools, and others.

If your business does not have a plan, we urge you to create one. Through free options such as the Open for Business books we have at the Chamber offices (also available online through [www.openforbusiness.com](http://www.openforbusiness.com)), you can create your own plan utilizing an easy to use template.

As always, we are dedicated to the prosperity of our Partners and hope to assist you in becoming as prepared as possible in the event of storms and other unplanned events.

Please let us know if we can help you in anyway, and please stay safe tonight with the threat of severe weather.

Sincerely,  
Krystal Crockett

**Krystal Crockett**  
918.366.9445  
[krystalc@bixbychamber.com](mailto:krystalc@bixbychamber.com)



A close-up, slightly blurred photograph of four customer service representatives in a call center. They are all smiling and wearing black headsets with microphones. The focus is on a woman in the foreground, who is looking towards the camera. Behind her are three other representatives, two men and one woman, also smiling. The background is a plain, light-colored wall.

## Collecting Feedback

# Case: Charleston Metro Chamber of Commerce



- ④ Formed a Business Continuity Planning (BCP) Council in 2006
    - Organized conferences and workshops from 2006 to 2012
    - Focus on four areas: Prepare, Protect, Response & Recovery
  - ④ In first event, they partnered with local health agency to discuss pandemic influenza with HR professionals.
  - ④ Developed Speaker's Bureau to present the business case to a broader audience.
  - ④ Delivered events at appropriate time just before disaster season.
  - ④ Effectively used local media to bring attention to the event.
  - ④ Over five-year period, they've trained 650 businesses on continuity planning.
-



# Relationships are Critical to Success



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## Government Partners

- City / Town
- County
- Regional
- State
- Federal (FEMA)

## Media Partners

- Newspapers
- Business Journals
- TV Stations
- Radio Stations

# Relationships are Critical to Success



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## Community Organizations

- United Way / VOAD
- Community Foundation
- Local nonprofits
- SBDC / SCORE

## Business Professionals

- Local Hospital Group
- Trade Organizations
- Local Colleges/Universities
- Major Employer



# Potential Sources of Funding

- ④ Local insurance providers
  - ④ Obtaining sponsorship from major employers
  - ④ Local Partners providing In-kind Contributions
    - Speakers, meeting space, free publicity, etc.
  - ④ Local or state office of emergency management
  - ④ EDA funds Disaster Recovery Coordinators that could play a supportive role
  - ④ Grants from corporate or community foundations
  - ④ Grants from federal providers (FEMA, EDA, SBA, USDA)
-

# Lessons Learned in Delivering Business Continuity Workshops



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- Both free and paid workshops have been well attended
  - Shorter events (morning or half-day) are better
  - Food = people in seats
  - Overlap with other events for larger audience at a broader topic
  - Qualify all speakers in advance to deliver a message with value
  - Time events to leverage media coverage (e.g., June 1)
  - Develop relationships to best advertise events
  - Deliver value to the attendees so they will promote
-



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# How to Market & Successfully Recruit Local Businesses

Krystal Crockett, President & CEO,  
Bixby Chamber of Commerce

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# Tips for Getting the Message out Through your Network

Krystal Crockett, President & CEO,  
Bixby Chamber of Commerce





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# Other Effective Marketing Tactics

Carrie Mulcaire, Director of Federal Grants  
IEDC

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# Additional Thoughts

## ① Storytellers are Most Influential Speakers

- Personal experience is a powerful motivator for others
- Can be difficult to find: relationships are important!

## ① Recruiting a Champion

## ① Timing of Events

- Media attention is highest around an incident
  - Take advantage of seasons
  - Transform message based on timing
-



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# PR & Media

Lynn Knight, Vice President, IEDC



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# Break



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# Preparedness for Economic Development Organizations & Chambers

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# Case: Bixby Metro Chamber of Commerce

Krystal Crockett, President & CEO,  
Bixby Chamber of Commerce

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# Our Plan

BMC Disaster Contingency Plan

Presentation by

**BIXBYMETRO**  
Chamber of Commerce

A woman with blonde hair tied back, wearing a black top, is shown in profile, looking upwards. Above her head, four question marks of varying styles (solid, dashed, and stylized) float against a dark background. A white rectangular box with a green vertical bar on the left contains the text "Why Did We Make a Plan?".

Why Did We  
Make a Plan?

We were telling our Partners to make a plan  
...Yet we had none







## Where Did Our Plan Come From





R&D – don't recreate the wheel

ACCE, IEDC, Manufacturing Alliances

We based ours on Joplin Chamber – close to us and have lived their plan





## Who Helped



Mix is key:

Private sector

Public sector

Technical experts

Edit to YOUR needs



A close-up photograph of two hands shaking in a firm grip. The hand on the left is light-skinned and belongs to a person wearing a grey suit jacket with two dark buttons visible. The hand on the right is dark-skinned and belongs to a person wearing a dark blue suit jacket. The background is a plain, light grey surface.

Partners We  
Worked With





Telecommunications company


Public Schools

Who in your area can provide space and access?

A black and white photograph capturing a group of sprinters in the middle of a race. The athletes are in a powerful, forward-leaning posture, with their arms pumping and legs pushing off the ground. They are wearing athletic gear, including tank tops and shorts, some with "WESHAM" visible. The background is a brick wall with vertical architectural elements. A white text box with a green vertical bar on its left side is overlaid on the left side of the image.

What We Are  
Ready to Do





As the Chamber, our job is to help our businesses. In the event of a disaster we have prepared:

Office space

Phone transfer

Databases and all files

Public signage





## Items to Audit





Pull together all vendors:

Insurance

Supplies

Utilities

Benefits





## Back Up Plans For Back Up Plans





Back up, back up, back up!

Redundancy is good

Plan is no use if no one can access it



A close-up photograph of a yellow butterfly pupa with black markings, hanging from a brown twig. The background is a blurred green. A white text box with a green vertical bar is overlaid on the left side of the image.

## How It's Still Evolving



Audit annually

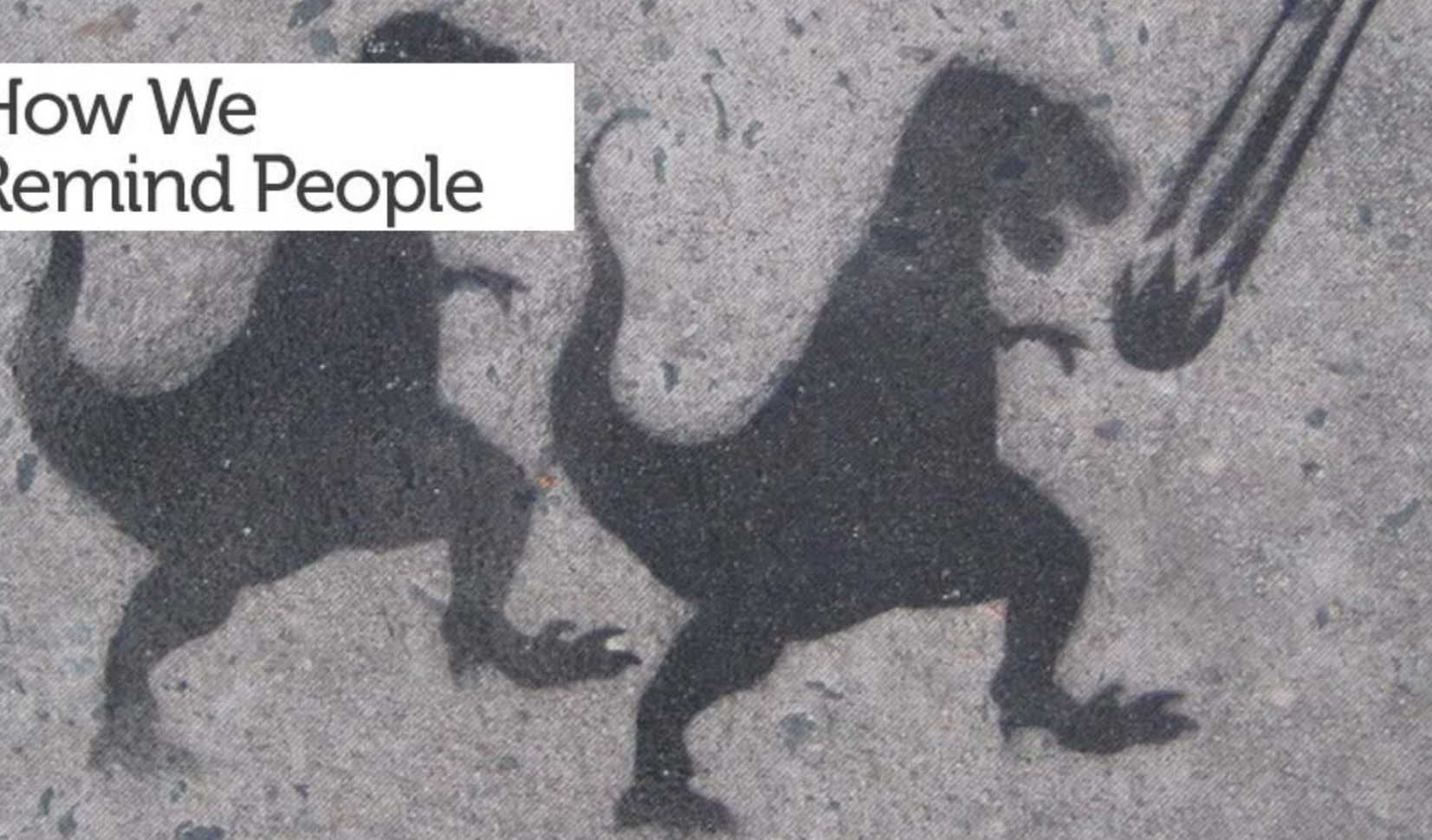
Next step – are we sustainable?

What if no money came in for 1 month...3 months...6 months...



**NEVER FORGET**

How We  
Remind People





**NEVER FORGET**







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# Additional Thoughts

Howard Pierpont, Certified Business Continuity Coach,  
The Disaster Institute



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# Testing the Plan & Other Follow-up

Howard Pierpont, Certified Business Continuity Coach,  
The Disaster Institute



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# Reviewing Expectations

Lynn Knight, Vice President, IEDC



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# Next Steps?

Lynn Knight, Vice President, IEDC