

The World's Largest Conferences Dedicated to Business Continuity



# SPRING WORLD 2004

MARCH 7-10, 2004 - ORLANDO, FL

Register by December 18, 2003 and Save! See Page 16 for Details



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Presents  
Its 30th  
Conference

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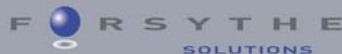
Interactive Disaster Simulation  
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March 7 - 10, 2004 • Disney's Coronado Springs Resort • Orlando, Florida

# Spring World 2004

DRJ presents its 30th Conference • The World's Largest Conference  
Dedicated to Business Continuity

## Welcome to Spring World 2004! We are the conference where



Richard  
Arnold,  
CBCP

DRJ  
President  
& CEO

you will find more information, more networking, more learning opportunities and more value.

Sign up for a schedule that suits your needs. Whether you are new to the industry or an advanced planner, you will find a variety of sessions. Choose from workshops, advanced tracks, best practices sessions, interactive simulations and more.

It is a high risk world out there. Protection. Security. Continuity. They are at the top of the list. Make Spring World 2004 your first stop for answers. With endless networking opportunities, expert speakers and timely topics, we have the answers you are seeking.



*There are plenty of opportunities for networking, problem solving and meeting with peers at Spring World 2004.*



See page 16 for registration and discount information. Find out



why we're the best value in the industry!



*Whether attending a workshop or networking with others, attendees get a complete experience at DRJ's conferences. Past attendees say:*

*"Great opportunity for those in disaster recovery/business continuity to improve their knowledge and enhance their skills."*

**Kevin McKay, Republic Bank and Trust**

*"Excellent place to enhance skills and knowledge. Ideal environment to network and build relationships with industry peers."*

**Birdi Olivarez Kidwell, VISA USA**

*"Nobody does it better! A great event with great presenters covering current topics!"*

**Dan Kennedy, FM Global**

*"A superb forum for the exchange of information between all levels of professionals in this industry."*

**Tim Kassian, EPCOR Utilities, Inc.**

*"This is still the best conference for the DR/BCP profession!"*

**Karl R. Lesch, CBCP, SuperValu, Inc.**



# Celebrate DRJ's 30th Conference

To celebrate our 30th conference, DRJ is providing prize drawings for fantastic trips and other prizes. Join us in Orlando and experience all the exciting opportunities you'll find at Spring World 2004!

**If you register by Dec. 18**, you will receive a \$50 discount to Spring World 2004, plus you'll be eligible for all the other fantastic prize drawings.

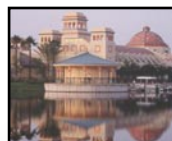
**If you register by Jan. 7**, two lucky winners will get to race around the Walt Disney World Speedway as part of the **Richard Petty Driving Experience**.\* Experience real-life racing thrills by riding shotgun in a two-seater Winston Cup-style stock car driven by a professional instructor.



In addition, two lucky winners will receive tickets to **La Nouba**\* the newest wonder from Cirque du Soleil. This show, located in Downtown Disney, was created exclusively for WDW and will captivate your imagination with high-energy acrobatics and choreography.



**If you register by Feb. 6**, you will be placed in a drawing for a free Walt Disney World vacation package.\* The deluxe package includes a six-day, five-night stay at Disney's Coronado Springs Resort in Walt Disney World and four, one-day park-hopper passes to Walt Disney World theme parks.



\* No purchase necessary. Open to U.S. residents 18 and older as of Feb. 6, 2004. Void where prohibited. Mailed entries must be received by Feb. 6, 2004. Entries are bound to official rules. Official rules are available by sending a self-addressed stamped envelope to: Spring World 2004 Contests, Disaster Recovery Journal, 11131 South Towne Square, Suite E, St. Louis, MO 63123 by Jan. 1, 2004.

## Special Events

**For one low fee, you receive** session admission, conference material, networking breakfasts, lunches, and admission to hospitalities, product demonstrations, a welcome reception and the exhibition hall.

The **Monday Evening Hospitality**, sponsored by **IBM Business Continuity & Recovery Services**, is a great networking opportunity. Enjoy fun, food and great conversation with peers.

**Interactive Disaster Simulation:** Participate in a real-time disaster simulation. This unique workshop will be offered on Sunday afternoon and is being sponsored by **SunGard Availability Services**. The session is limited to 200 participants.

**Cyber City** The Cyber City, sponsored by **Rentsys Recovery Services**, provides an area where attendees can surf the net or check e-mail. The cafe will be open during a variety of hours, providing plenty of chances to utilize the service.

**Free Gift for Survey Participation** Attendees can participate in an industry survey on terrorism and receive a gift. Conducted by Pepperdine University, the survey can be dropped off at the DRJ booth.

**Conference Proceedings On CD-ROM and in Binder Format** Attendees receive proceedings from sessions at no extra cost. The conference binder includes a hard copy of the session contents and attendees receive a CD-ROM.

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# Our Sponsors

## Conference Co-Sponsors



Agility Recovery Solutions is a premier provider of on-site recovery solutions across the US and Canada. Formerly GE Capital IT Solutions Disaster Recovery Services, the company has a long and successful history. Agility Recovery Solutions offers the most comprehensive range of flexible, cost-effective and practical disaster continuity and recovery programs. [www.agilityrecovery.com](http://www.agilityrecovery.com)



Real-Time Disaster Recovery

Evergreen Assurance has created the world's first Disaster Recovery Management System (DRMS) – an integrated solution that protects your company's most critical applications. The

Evergreen DRMS provides real-time disaster recovery of application functionality and data during any crisis or disaster, planned or unplanned. Designed around crisis management, the DRMS provides integrated command and control capabilities to affect a complete and rapid recovery. [www.evergreen.net](http://www.evergreen.net)



Custom Critical

Whether you're in the midst of a disaster or running test shipments, count on FedEx Custom Critical for all of your critical-shipment needs.

We're North America's largest time-specific, critical-shipment carrier - providing 24/7 pickup and delivery throughout the U.S. and Canada. With a fleet of 1,500 vehicles, FedEx Custom Critical provides access to remote areas that are inaccessible by aircraft. Other services include our White Glove Services® division and our CharterAir® division. [customcritical.fedex.com](http://customcritical.fedex.com)



Since 1971, Forsythe has served as a national provider of technology infrastructure solutions to organizations nationwide, including many

Fortune 1000 companies. A trusted, independent advisor, Forsythe brings cross-platform expertise to its technology consulting, technology leasing, and value added reseller services. While addressing the complete technology lifecycle, including assessment, design, integration, and management, Forsythe offers a single point of contact for managing the cost and risk of information technology infrastructures. [www.forsythe.com](http://www.forsythe.com)



Be prepared.

MessageOne helps enterprises prepare for and respond to disruptions in their normal business operations with the best and most cost-efficient solutions in the industry. The company's flagship

product is EMS (Emergency Messaging System), which provides guaranteed continuity of corporate enterprise messaging and email communications as well as emergency employee notification services. [www.messageone.com](http://www.messageone.com)

## Conference Co-Sponsor and Interactive Disaster Simulation Sponsor



AVAILABILITY SERVICES

SunGard Availability Services is the pioneer and leading provider of information-availability services, helping to ensure that more than 10,000 clients in

North America and Europe have uninterrupted access to their business-critical information systems. With over 3 million square feet of hardened facilities, SunGard offers a complete range of information availability services for more than 30 technology platforms, from 48-hour disaster recovery hot sites to always-on, high-availability infrastructure, co-location and electronic vaulting services. SunGard also provides technology and systems management services for application and data center outsourcing, as well as *business continuity consulting services and planning software*.

[www.availability.sungard.com](http://www.availability.sungard.com).

## Cyber City Sponsor



Rentsys Recovery Services is the premier, nationwide continuity provider of recovery and contingency solutions. Our services focus on the recovery

of clients' critical business processes through our alternate workspaces, replacement hardware, and restored communications. We have fixed facilities located throughout the U.S., access to a mobile fleet of over 90,000 trailers, and an extensive inventory of tier-one technology available to recover your organization. [www.rentsys.com/recovery](http://www.rentsys.com/recovery)

## Conference Gold Sponsor



In an era of dynamic change, all organizations are experiencing escalating and changing threats and increased regulatory requirements. IBM understands how critical continuous business processes are to your financial viability and success. IBM applies its industry specific business and technology expertise to identify, evaluate, mitigate and manage risks. IBM's Business Resilience and Continuity Services can cost effectively help you rapidly adapt and respond to internal or external dynamic changes – opportunities, demands, disruptions or threats – and continue operations with limited impact to the business. Our skilled and experienced professionals will lead you through our comprehensive and logical process to put you confidently on the path to business resilience.

**Advisory Services** – IBM's Advisory Services for Business Resilience and Continuity enable you to evaluate your business resilience needs and improve your capabilities across four broad competencies: availability, continuity, recovery and security.

**Infrastructure Recovery Services** – With our multivendor IT recovery services, IBM professionals can sort through the complexity of various computing hardware, peripherals, communications equipment, operating systems and infrastructure to help you develop a recovery solution that best suits your business needs. With over 300 successful customer recoveries worldwide and operations in over 72 countries, you can count on the people of IBM to develop and implement recovery solutions that protect your business.

**Managed Services** – IBM offers enterprise business continuity program management and managed security services. Through a set of interlocked services, IBM's skilled professionals assume the responsibility for managing the complex scope of your total business continuity program on your behalf. IBM works with you to plan, design, construct and operate a security-rich environment for your online applications and transactions – providing a total security plan that protects you and your customers and evolves in step with your business.

[www.ibm.com/services/continuity](http://www.ibm.com/services/continuity)

## Non-Profit Conference Co-Sponsors



DRII is a recognized leader in providing education, standards, and professional certification. DRII's goals are to create a base of common BCP knowledge through education, assistance, and the development of a resource base; to certify qualified individuals; and to promote the credibility and professionalism of certified professionals. [www.drii.org](http://www.drii.org)



Private and Public Businesses, Inc. is committed to providing the industry with training and BC solutions in partnership with both private and public agencies that contribute to the effective collaboration required for regional disasters. [www.ppbi.org](http://www.ppbi.org)

# Conference At A Glance

## Saturday – March 6

8:00 a.m. - 5:00 p.m.	PRC-1: Arvish Course*
8:00 a.m. - 5:00 p.m.	PRC-2: Phelps Course*
8:00 a.m. - 5:00 p.m.	PRC-3: Pruitt Course*
8:00 a.m. - 5:00 p.m.	PRC-4: PPBI Course*
8:00 a.m. - 5:00 p.m.	PRC-5: Till Course*
8:00 a.m. - 5:00 p.m.	PRC-6: Harris/Cowan Course*
8:00 a.m. - 5:00 p.m.	PRC-7: Lewis Course*

\* Each course requires separate registration and fees. Some courses continue on Sunday. See pages 18 - 19 for more details.

## Sunday – March 7

8:00 a.m. - 11:30 a.m.	PRC-2: Phelps Course
8:00 a.m. - 11:30 a.m.	PRC-3: Pruitt Course
8:00 a.m. - 11:30 a.m.	PRC-4: PPBI Course
8:00 a.m. - 11:30 a.m.	PRC-5: Till Course
8:00 a.m. - 11:30 a.m.	PRC-6: Harris/Cowan Course
8:00 a.m. - 11:30 a.m.	PRC-7: Lewis Course
11:00 a.m. - 8:00 p.m.	Onsite Conference Registration
12:00 p.m. - 8:00 p.m.	Cyber City Open
1:30 p.m. - 4:30 p.m.	Sunday Workshops
4:30 p.m. - 5:45 p.m.	DRII Meeting and Reception
5:30 p.m. - 8:00 p.m.	Welcome Reception in Exhibit Hall
5:30 p.m. - 8:00 p.m.	Product Demonstrations in Booths

## Monday – March 8

6:30 a.m. - 6:30 p.m.	Cyber City Open
6:45 a.m. - 8:00 a.m.	Networking Breakfast
7:00 a.m. - 5:00 p.m.	Onsite Registration continues
8:00 a.m. - 8:15 a.m.	Welcome & Announcements
8:15 a.m. - 9:15 a.m.	General Session 1
9:15 a.m. - 9:30 a.m.	Break
9:30 a.m. - 10:30 a.m.	General Session 2
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. - 11:45 a.m.	General Session 3
11:00 a.m.	Exhibit Hall Opens
11:45 a.m. - 1:30 p.m.	Lunch/Exhibits/Product Demos
1:30 p.m. - 2:30 p.m.	Breakout Session 1
2:30 p.m. - 2:45 p.m.	Break
2:45 p.m. - 3:45 p.m.	Breakout Session 2
3:45 p.m. - 4:15 p.m.	Refreshment Break in Exhibit Hall
4:15 p.m. - 5:15 p.m.	Breakout Session 3
5:00 p.m.	Exhibit Hall Closes
5:15 p.m. - 6:15 p.m.	Product Demonstrations
6:30 p.m. - 8:30 p.m.	Hospitality <i>sponsored by IBM Business Continuity &amp; Recovery Services</i>

## Tuesday – March 9

6:30 a.m. - 6:00 p.m.	Cyber City Open
6:45 a.m. - 8:00 a.m.	Networking Breakfast
7:00 a.m. - 5:00 p.m.	Registration/Info. Desk Open
8:00 a.m. - 8:15 a.m.	Announcements
8:15 a.m. - 9:15 a.m.	General Session 4
9:15 a.m. - 9:30 a.m.	Break
9:30 a.m. - 10:30 a.m.	General Session 5
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. - 11:45 a.m.	General Session 6
11:00 a.m.	Exhibit Hall Opens
11:45 a.m. - 1:30 p.m.	Lunch/Exhibits/Product Demos
1:30 p.m. - 2:30 p.m.	Breakout Session 4
2:30 p.m. - 3:00 p.m.	Refreshment Break in Exhibit Hall
3:30 p.m.	Exhibit Hall Closes
3:00 p.m. - 5:30 p.m.	Workshop Sessions

## Wednesday – March 10

6:45 a.m. - 8:00 a.m.	Networking Breakfast
7:00 a.m. - 12:00 p.m.	Information Desk Open
8:00 a.m. - 8:15 a.m.	Conference Announcements and DRII Announcements
8:15 a.m. - 9:15 a.m.	General Session 7
9:15 a.m. - 9:30 a.m.	Break
9:30 a.m. - 10:30 a.m.	General Session 8*
10:30 a.m. - 10:45 a.m.	Break
10:45 a.m. - 11:45 a.m.	General Session 9
11:45 a.m. - 1:00 p.m.	Lunch
1:00 p.m.	Certification Examinations**
1:30 p.m.	POC-1: Phelps Course**
1:30 p.m.	POC-2: Pruitt/Herrera Course**
1:30 p.m.	POC-3: PPBI Course**
1:30 p.m.	POC-4: Till Course**
1:30 p.m.	POC-5: Buffington Course**
1:30 p.m.	POC-6: Williams Course**
1:30 p.m.	POC-7: Hawkins-Mitchell Course**
1:30 p.m.	DRII Courses**

\* Attendance prize drawing will be held immediately following the close of General Session 8. You must be present to win.

\*\* Courses require separate registration and fees. See pages 20 - 23.

### Earn CEU Credits

Earn up to 28 Continuing Education Points by attending this conference. Earn up to 77 Continuing Education Points by attending this conference, a pre-conference class and a post conference course. A certificate noting the conference CEU points will be mailed to all attendees following the close of the conference.

# Sunday Workshops

1:30 p.m. - 4:30 p.m.

Sunday Workshop Session – 1  
Novice

*New!*



## BCP-101

Session limited to 200 participants.

Ed Devlin,  
CBCP

ES Devlin  
& Assc.



Norm  
Harris  
CBCP  
CRP

Harris  
Disaster  
Rec.  
Inc.

This must-attend workshop has been developed to provide practitioners with the basics of business continuity planning. It is taught by two industry pioneers and is designed to set the stage for attendees to better understand the lessons they will learn during the DRJ conference.

This session will explain the changes in the scope of the planning required by the many incidents that have occurred during the last 30 years. It will review what is expected of the disaster recovery/business continuity planner in today's fast pace, ever changing, business

world we all live in.

You will be exposed to questionnaires and plan development documentation requirements that every DR/BCP needs in order to do his job. The information you will receive during this session will save you time and help guide you through your own plan development cycle.

*Ed Devlin, CBCP, is a consultant, author, instructor and speaker on business continuity. He has provided business recovery planning consulting services since 1973 when he founded Devlin Associates. Since that time, Devlin has assisted more than 1,000 companies in the writing of their business recovery plans and has presented more than 800 seminars and presentations worldwide.*

*Norm Harris, CBCP, CRP, president & CEO of Harris Disaster Recovery Inc., is a recognized leader in information technology management & disaster recovery. Harris has consulted with hundreds of business clients in every major industry with their business recovery planning requirements.*

Sunday Workshop Session – 2  
Novice/Intermediate



## Exercising and Maintaining the DRP

Harlan  
Dolgin,  
CBCP

Well Point  
Health  
Networks

Exercising and maintaining the DRP is pretty much just as it sounds. It will review the methodology of exercising the disaster recovery plans and identify key components of what the disaster recovery plan should contain. Then there will be a discussion of some general principles on how to keep the plans maintained and up-to-date in between exercises, and a discussion of some general terms that are important to DR.

This presentation includes an active simulation for the participants. For the simulation, participants will be divided into groups of 10 or less, and they will be given a scenario that will damage a fictitious building the group operates. It will be necessary to analyze the scenario and react accordingly. As the scenario unfolds with new facts every few minutes, participants will be able to apply some of the techniques that were identified in the prior discussion.

*Harlan Dolgin began working in the business continuity field in 1997 at Mercantile Bank as a network administrator with disaster recovery responsibilities for the NT and Novell environment. After working in NT/Novell administration for several years, he was promoted to vice-president and manager of corporate contingency planning, which he held for another year and a half. Dolgin joined WellPoint Health Networks (formerly Blue Cross and Blue Shield of Missouri) in March 2001, with responsibility for revitalizing the Missouri business continuity and disaster recovery program. He became a Certified Business Continuity Planner in March 2001, and has been the program chair of the Mid-America Contingency Planning Forum since January 2002. Prior to his technology career, Dolgin practiced civil and trial law for eight years with the Dolgin, Dolgin and Watts law firm in St. Louis. He has maintained his law license with the State of Missouri.*

Sunday Workshop Session – 3  
Novice/Intermediate/Advanced



## Business Impact Tolerance Workshop

Michael  
Smith

Ernst &  
Young  
LLP

Does the mention of doing a business impact analysis at an executive meeting empty the room faster than a fire alarm? Does senior management suddenly avoid you in the hall? Do you wonder why? This interactive, scenario-based workshop will provide attendees with an understanding of how the BIA process can be streamlined for efficiency without losing the value of the process. The business impact tolerance workshop will demonstrate, with audience participation, a real life company's process to identify business impacts and determine the critical path of the organization for developing a roadmap for their business continuity program.

During this session, attendees will gain an understanding of how executives consider and respond in defining what is critical to their company. In addition, attendees will discover how this process will help with executive support and organizational buy-in.

*Michael Smith is a leader in Ernst & Young's North American business continuity practice. He has extensive experience in all aspects of risk assessment, business impact analysis, strategy development, crisis management, disaster recovery planning and business continuity planning. Smith draws on 31 years of information technology related experience to support the clients of Ernst & Young. He has specialized in business continuity consulting for the past 18 years. Smith has been a consultant in many sectors of the North American economy, including telecommunications, insurance and banking, food services, mining, aerospace, retail, government, and high technology organizations. Prior to becoming a consultant in the business continuity planning field, he spent 12 years in the insurance industry with increasingly responsible positions in information technology.*

Sessions are rated according to the level of experience for which they are appropriate. Novice for those in the industry less than two years; intermediate for those in the industry for 2 - 5 years; and advanced for those in the industry for more than 5 years.

Sunday Workshop Session – 4  
Advanced



**Dealing with the Knowledge Crisis: Preserving Corporate Knowledge and Productivity When Employees Leave**

Jeremiah Boenisch



David Harden

TKCC

Imagine this scenario: A valuable employee quits and takes her knowledge and experience with her. As co-workers scramble to piece together scraps of data, take on extra responsibilities, or help new hires get up to speed, the organization loses time, productivity, and revenue. How do I stop knowledge from walking out the door when employees leave? In every sector of the economy, an alarming exodus is occurring due to baby boomer retirements, downsizing, and high employee turnover. The result is lost knowledge and experience that cripples their organizational effectiveness, competitiveness, and preparedness.

This session will explore how to link management, people, knowledge and organizational objectives together while changing the way leaders manage and protect their most valuable asset: knowledge.

Join this fast-paced, comprehensive, and action-oriented workshop. Learn to recognize the threat knowledge loss poses to your organization. You'll take away tools, techniques, and a framework that can work for your organization's risk management.

*Jeremiah Boenisch is co-author of "Continuity Management" and a U.S. Air Force officer with expertise in team building, leadership, tactical communications, and knowledge continuity management.*

*David Harden is co-author of "Continuity Management" and a U.S. Air Force officer who understands the intricacies of government interagency contingencies and has expertise in leadership, team building, personnel policy, and continuity management.*

Sunday Workshop Session – 5  
Novice/Intermediate/Advanced



**Crisis Training Workshop**

Steve Cody

Ed Moed

Peppercom

Peppercom delivers a value-added, crisis training and assessment workshop to prepare senior executives and crisis teams for any situation. It forces them to deal with all constituent audiences during a crisis situation, including employees, media, customers, investors and government/legal authorities, among others.

While members of our team lead the session, other members will be out interacting with the audience, making sure that everyone is constantly engaged.

This workshop will prepare continuity professionals and management teams to better deal with any crisis situation. It will be conducted as an interactive, humorous and engaging session that encourages audience participation. The workshop will consist of, but is not limited to:

The Mock-Crisis Situation – A fictitious company will be created and a selected "management team" will act out the crisis situation, with the remainder of the audience acting as employees.

Participants will be drilled and evaluated on how they handle the crisis as it unfolds.

*As managing partner and co-founder of Peppercom, Steve Cody is responsible for overall agency direction and management, new business and product development, marketing and overall account management. Cody has been instrumental in Peppercom's rise from a two-person start-up in 1995 to its current position as one of the nation's best known and most strategic mid-sized public relations firms.*

*Ed Moed is a co-founder and managing partner of Peppercom. His responsibilities include overall agency oversight and leadership, strategic planning and account direction, product development and new business. Recently named a finalist in Ernst & Young's prestigious "Entrepreneur of the Year" award.*

Sunday Workshop Session – 6  
Novice/Intermediate/Advanced

*Interactive Disaster Simulation*

**It's Your Move: An Interactive Information Availability Scenario**

Sponsored by

**SUNGARD**  
AVAILABILITY SERVICES

**Session limited to 200 participants.**

This role-playing exercise involves team participation. Each team will represent a separate company, function, or organization responding to a business interruption scenario. Teams will be given a framework from which to operate, and will have the opportunity to dynamically interact with other teams, share information, and walk through the experience of a recovery exercise.

The event is played on in multiple rounds, each approximately 20 minutes in length, and each round representing a particular point in time subsequent to the interruption. In the end, the participants are able to assess the success of their decisions, and will have a deeper understanding of the importance of continuity planning, setting recovery goals, as well as the impact of decisions both within and outside their department.

*SunGard Availability Services is the pioneer and leading provider of information-availability services, helping to ensure that more than 10,000 clients in North America and Europe have uninterrupted access to their business-critical information systems. With over 3 million square feet of hardened facilities, SunGard offers a complete range of information availability services for more than 30 technology platforms, from 48-hour disaster recovery hotsites to always-on, high-availability infrastructure, co-location and electronic vaulting services. SunGard also provides technology and systems management services for application and data center outsourcing, as well as business continuity consulting services and planning software.*

# General Sessions

**Monday**

General Session 1  
8:15 – 9:15 a.m.



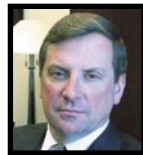
## **Growing Great: Secrets of Peak Performers**

Top achievers in any field follow sure-fire success habits, whether they are business people, athletes, performers or disaster recovery professionals! This session will look at ways we can all increase our level of effectiveness and still enjoy each day on the job.

*Lou Heckler*

*Lou Heckler was our first professional speaker at Spring World in 1992 and he is delighted to come back as we celebrate 15 years of conferences. He is a Pittsburgh native, a North Carolina Tar Heel by education and a Floridian by choice since 1979. He is a United States Army veteran, a former adjunct faculty member at the University of Michigan and worked in commercial television for 11 years.*

General Session 2  
9:30 – 10:30 a.m.



## **Meeting the Challenge: Keeping America on the Move**

Protecting the continuity of the US transportation industry is a tremendous undertaking. What are some of the key issues on the homeland security front? What does it take to integrate federal, state and local security agencies? In this session, the director of the transportation security coordination center will discuss a multi-million dollar command center and how it is helping win the war on terror. DR best practices, site selection and technology will be included.

*Curt Powell,  
CBCP  
TSA*

*In July 2003, Curt Powell officially stood up the Transportation Security Coordination Center (TSCC) after devoting the previous 18 months to its creation, design and build out. Powell, deputy director for crisis management, is responsible for the management and direction of programs that maintain a continuous assessment of terrorist threats against the Nation's domestic and international transportation systems.*

General Session 3  
10:45 – 11:45 a.m.



## **Operational Resiliency**

Increased regulations have heightened the focus on resiliency and business continuity at all levels of an organization's management. After recent corporate scandals, the Sarbanes-Oxley Act was signed into law to strengthen overall business operations. While the Sarbanes-Oxley Act may be focused on the integrity of financial information, business continuity management plays an important role to ensure that internal controls are in place to identify and reduce risks that affect your business resilience. The resilient business is one that is able to seamlessly handle both the negative and positive stresses in its pursuit of greater business success. This can only be achieved through a balanced, systematic approach that examines all components within an enterprise across both the business and IT infrastructures.

*John Jackson  
IBM*

*John Jackson is vice president, business resilience and continuity services, for IBM in the United States. This includes over 700 professionals and 16 recovery facilities which support customers in a broad cross section of industries. Jackson's responsibilities include strategic direction, business management, sales, delivery, consulting, segment/product management as well as all supporting areas of the business.*

General Sessions are held on Monday, Tuesday and Wednesday mornings. The sessions are targeted to business continuity planners of all experience levels.

Join in on the laughter, the learning and the networking!

Our general session speakers bring to the audience a wealth of information and enlightenment. They are industry experts who can provide you with the information and answers you've been looking for!

General Session 4  
8:15 – 9:15 a.m.

## Tuesday



### Adult Swim – BCP Technology Future

“Adult Swim” is a swimming pool analogy that refers to those times when adults find it more enjoyable to have the kids “out of the pool.” This session is targeted to those within the BCP world who are way past dog paddling their way to recovery and are more than ready for the high-dive platform. With a sea of emerging solutions to select from, which ones will sink or swim? This session will navigate through the most important technologies that will be washing up on our BCP shores over the next 24 to 36 months.

Tari  
Schreider

Hewlett  
Packard

*Tari Schreider is the program project manager for Hewlett-Packard's North American security practice. He has been involved in the IT field for 27 years with 18 in security and business continuity.*

General Session 5  
9:30 – 10:30 a.m.



### A New Threat to Add to Your Plan: A Pandemic

Today, more than 6 billion people live on Earth. Everyday, up to 2 million people worldwide cross international borders. Using the service of an aircraft, the SARS virus or any other pathogen can be virtually anywhere within 48 hours. In the face of a pandemic, air travel could grind to a halt; schools, factories, and offices would have to close; business and leadership meetings would be postponed. This session will discuss the history of pandemics over the past 150 years, current suggested practices, the current state of disease outbreaks in the world and what you should be doing to be ready.

Regina  
Phelps

EMSS

*Regina Phelps, CEM, RN, BSN, MPA is founder of Emergency Management & Safety Solutions, a training and consulting company specializing in emergency management, continuity planning and safety.*

General Session 6  
10:45 – 11:45 a.m.



### Getting From No Go to the Big Show!

Have your efforts been stymied by uncooperative senior management and competing business objectives? Then you know how difficult it can be to get a group involved, excited, and committed. You also know funding; keeping others focused and on track; dealing with difficult personalities, hidden agendas, and politics can be challenging and stressful. Learn what you can do to keep objectives moving and the funds flowing. Rethink the value of your meetings to help maximize results through your refined, professional methods that help others save face, build buy-in, and keep you on track!

Barry Pruitt

PruSpeak

*Barry Pruitt is president of PruSpeak Incorporated, a global training and consulting organization, and an adjunct professor for the USC School of Business.*

General Session 7  
8:15 – 9:15 a.m.

## Wednesday



### An Unusual Perspective: Best Practices Across the Verticals

Across every major industry, mandates for productivity improvement through increased integration are running at a fever pitch. In the midst of all this activity, a unique connection emerges. SunGard has garnered a unique 3rd party perspective and expertise. Surprisingly, the most interesting story resides not within each segment, but within the huge crossover in vertical markets, as we discern evolving trends in business continuity planning and the challenges of new technology.

Ken Smith

SunGard  
Availability  
Solutions

*As EVP of Strategy & Software for SunGard Availability Services, Ken Smith drives strategy and analysis of the regulatory environment, customer issues, and new methods.*

General Session 8  
9:30 – 10:30 a.m.



### Terrorism: Best Practices for Addressing the Threat

Establishing best practices in successfully addressing any organizations' exposure to the threat of terrorism is difficult. What constitutes success? How is it quantified and effectively communicated to our executives? How do we successfully integrate it most effectively into our ongoing BC/DR planning? These are among the more pressing questions faced by any organization, whether small or large, public or private. The presentation will provide an overview of how to address these questions and how to establish best practices with respect to addressing the threat of terrorism.

Anthony  
Arvish

AJA  
Consulting

*Tony Arvish served as an operations officer in the CIA where he spent extensive time working against terrorist groups. Arvish currently works as an independent consultant on counter-terrorism.*

General Session 9  
10:45 – 11:45 a.m.



### Crisis Team Engineering: Designing for Optimal Performance Before, During & After a Crisis

There is a big difference between building a team and engineering a team. This program presents specific skills and tools for making your crisis teams more effective before, during and after an event. Examples include a case study and step-by-step, end-to-end process model for identifying & managing performance stages.

Ted  
Buffington

Achievement  
By Design

*Ted Buffington is an internationally recognized researcher, lecturer, trainer and consultant in the field of human behavior and motivational psychologyes. He is CEO of Achievement By Design, a research & consulting organization specializing in high performance teams.*

Strategic Session – 1  
Novice/Intermediate/Advanced



## Sarbanes-Oxley Act and You

*Alan Hughes*  
*W.C. Bradley Co.*

The Sarbanes-Oxley Act contains requirements that will likely affect your company's IT department, and your DR/BC plans. While SOA seems to relate only to financial issues, requirements for retention/recovery of financial data, and the restoration of operations in a timely manner are indicated, and these will find their way into the audit criteria for your company. This session will take a closer look at how the Sarbanes-Oxley Act might affect you and your company, and how it might help you as a business continuity planner.

*As the manager of disaster recovery and information security, Alan Hughes directs the disaster recovery and information security efforts of the W.C. Bradley Co.*

Managerial Session – 1  
Intermediate/Advanced



## Corporate Command and Control Centers

*Ron Tucker, CBCP*  
*RGT*

Attendees to this session will be introduced to the methodology for the construction and operation of a proven corporate command and control center concept that can be adapted to any situation, varying from a major disaster affecting the whole company to a special event concerning only a portion of the company. Organizational structures along with roles and responsibilities and information flows will be presented.

*Ron Tucker is an internationally recognized expert in business continuity planning, project management and negotiations. Tucker has also established a strong leadership reputation, from his role as a founding member of the Disaster Recovery Institute Canada Certification Committee, and positions on the board of the International Disaster Recovery Institute and Certification Commission.*

Technical Session – 1  
Intermediate/Advanced



## The Northeast Power Outage: Lessons Learned

*Mike Cannon, CBCP*  
*Bank of America*

When a massive power outage struck the Northeastern United States and Canada, it affected millions of homes and businesses. What were the lessons learned from this major outage? How can we prepare for such a disaster in the future? In this session, learn how Bank of America Corporation's seasoned business continuity team faced the challenges of moving the Global Corporate & Investment Banking group in New York to an alternate site in New Jersey, and relocated corporate employees without missing a beat.

*Mike Cannon is the national manager of business continuity management for the Bank of America and reports through the technology and operations group.*

Emergency Response Session – 1  
Novice/Intermediate/Advanced



## Hot Site Testing 101 – Insights to Maximizing Your Testing Efforts

*Tom Serio*  
*Office Depot Corp.*

The presentation covers various insights to hot site testing, from test plan development to testing schemes to the logistics of coordinating a test. The bottom line is that you need to work closely with the hot site provider, including defining objectives, holding a pre-test workshop, using hot site personnel for support, gathering their input to the exercise and making improvements for next time. The presentation also discusses using the hot site vendor's resources, from temporary help to technology features to professional services.

*Tom Serio is the business continuity manager for Office Depot, responsible for the BCP efforts for the domestic and international business lines. He has been in the IT field for more than 20 years, in operations and management, with a focus on DR/BCP.*

Advanced Session – 1  
Advanced



## Business Resiliency Risk Assessment - Maximum Coverage, Minimum Cost

*Kelly Jones, Ph. D.*  
*Evergreen Assurance*

Preparing a business resilient organization involves understanding cause and effect. What can cause your organization to experience a business interruption? What can be used to protect against a specific threat? How do you choose between different options given a specific set of coverage needs? This session will provide a framework and methodology to select and analyze a threat portfolio relative to the desired level of risk mitigation and investment against the threat portfolio.

*Dr. Kelly Jones is senior vice president in charge of software development and client operations. His work included initial R&D and product development for the Evergreen Disaster Recovery Management System.*

Information Session – 1  
Novice/Intermediate/Advanced



## Expediting the Data Recovery Process

*Steve Spiewak*  
*Iron Mountain*

In today's information-driven society, businesses can't afford not to have pre-determined contingency plans in place for data recovery. Whether caused by a power outage, natural disaster or another unexpected crisis situation, any disruption to data can be detrimental to the organization, its customers – and the bottomline. When a data disruption does occur, it's almost a sure bet that companies will be forced to transport data tapes to a hot site or ship backup tapes from a storage vault to their location – quickly and securely.

*James Snider is vice president and general manager of FedEx Custom Critical's White Glove Services division.*

*Steve Spiewak, a marketing manager with Iron Mountain Off-Site Data Protection, drives marketing initiatives and fosters business development partnerships.*



*James Snider II*  
*Fed Ex Custom Critical*

Strategic Session – 2  
Intermediate/Advanced



### Business Continuity Planning in Today's Changing Business Climate

Randy Till,  
CBCP

This session will provide an overview of business continuity planning in today's ever-changing business climate. Today, more than ever, business managers must understand the threats and risks facing their organizations in order to implement effective and cost-efficient solutions to manage these risks. Learn how to establish successful BCP processes and plans within an organization. Using his experience, Till will provide practical and real-life examples of techniques used to implement business continuity plans and how to achieve acceptance within an organization's culture and business practices.

Randy Till, CBCP, is vice president, global business continuity management for Master-Card International.

Managerial Session - 2  
Novice/ Intermediate/Advanced



### Supply Chain Management Fundamentals: Implications for Continuity Planning

Thomas Gaitley  
CBCP

Learn valuable insights into how the drivers of supply chain management may change under catastrophic conditions. He will discuss: the risks and exposures inherent in the design and implementation of supply chain strategy; the impact of supply chain optimization upon business continuity management techniques and practices; and, the appropriate steps that business continuity professionals can take to prepare and respond to supply chain management generated risks and exposures.

Thomas Gaitley, CBCP, is a managing consultant with Copper Harbor Consulting, Inc. where he provides clients with risk, continuity and crisis management consulting services.

Technical Session – 2  
Intermediate/Advanced



### Backup's Crystal Ball

Mark O'Malley

Quantum  
DLTape  
Group

Data backup quickly becomes meaningless when system or equipment crashes bring the process to a screeching halt. Effectively managing tape-based storage systems requires staying one step ahead of failures in tape drives and media. This presentation explores the latest technology behind intelligent storage diagnostic tools for tape-based systems, which allow IT end-users to better manage backup processes. Attendees will receive an overview of tips and techniques for leveraging intelligent diagnostics within their own tape-based systems.

Mark O'Malley is senior manager, business planning & development for Quantum's DLTape Group. He is responsible for product marketing activities that span Quantum's portfolio of tape drives.

Emergency Response Session – 2  
Novice



### The Basics for Testing Your Plan

Regina Pantazi,  
CBCP

When you exercise your BC or DR plans, how do you know that you have considered all the aspects of the business or application? If and when a real event occurs that requires a recovery, are you sure you will be able to "reproduce" all of the functionality that your business requires? In this presentation, we will share the standard elements we test against when exercising our BC/DR plans. We will step through the 10 standard elements to assure comprehensive DR testing and eight standard elements for BC testing.

Regina Pantazi, CBCP, is the director of corporate contingency services for Bank One.

Mike Gifford, CBCP, is the director of disaster recovery for Bank One's Infrastructure and Operations team within IT.



Mike Gifford,  
CBCP

Bank  
One

Advanced Session – 2  
Advanced



### Leveraging High Availability and Disaster Recovery Strategies Together for BC

David Edborg

If you examine high availability and disaster recovery disciplines closely, you begin to understand they really are both about continuity of operations. Is it possible to leverage both of these practices together for a business continuity strategy? Perhaps. In this session we will present a method for classifying losses and how HA and DR techniques can be used to create a tiered continuity strategy, with a goal in mind to reduce cost and to use a building block approach to continuity of IT operations.

David Edborg has worked on the development of NCSC approved computer security software. Edborg is currently an independent consultant.

Information Session – 2  
Novice/Intermediate/Advanced



### Impact of Regulatory Issues on Business Continuity

Michael Croy

Forsythe  
Solutions  
Group

It is well known that government regulations like Sarbanes-Oxley, HIPAA and the Gramm-Leach-Bliley Act have changed the way business is done. When looking at the impact these regulations play in the big business picture, it is common to overlook the impact these regulations will have on a company's business continuity plan. Audience members will gain an overview of current government regulations that can potentially impact a company's business continuity and learn effective tips for selecting, implementing and modifying business continuity plans to adapt to existing and new government regulations.

As Forsythe's business continuity practice manager, Michael Croy is responsible for risk analysis, best practice models for continuity of IT infrastructure and disaster recovery planning, strategy, and management.

# Breakout Session • Track 3

Monday, 4:15 - 5:15 p.m.

Strategic Session – 3  
Intermediate/Advanced



## Terrorism Risks Facing Every Organization: Planning for Mitigation and Recovery

Robert Chandler, Ph.D.

Pepperdine University

This session summarizes lessons learned on prevention, mitigation, personnel protection, response, continuity, and recovery derived from 21st Century terror attacks. In the aftermath of 9-11; awareness of the risks of terrorism has grown exponentially. The reality is that most were unprepared. This session seeks to offer a summary of approaches and representative models of contemporary best practices to vividly illustrate and document the lessons learned in previous terror attacks. The presentation will be accompanied by a video summarizing best practice of continuity planners.

Robert Chandler, Ph.D., is a professor of communication at Pepperdine University specializing in communication, crisis management training and assessment.

Managerial Session – 3  
Novice/Intermediate



## Business Continuity Program Development

Ed Clayton, CBCP

Greater Bay Bancorp

This presentation addresses what it takes to develop a successful business continuity program. The presentation includes a brief explanation of the basics but quickly moves onto more advanced explanations as to how to go about preparing, creating, budgeting, and obtaining management approval. A common sense approach on how to go about developing a program that meets your company or organizational needs, complies with regulations, and follows acceptable industry standards.

Ed Clayton, CBCP, MBCI, is presently the vice president – business continuity director at Greater Bay Bancorp. He has had more than 11 years experience in the business continuity field.

Technical Session – 3  
Novice/Intermediate/Advanced



## Security Management Practices 101

Doug Conorich

IBM Global Services

The number of new vulnerabilities discovered is increasing every year. Hackers and virus writers are exploiting these with greater rapidity. Security programs need to cope with these new threats.

Unfortunately, many companies do not recognize the risks or the potential losses due to inadequate security. Learn how organizing your security program along the line of industry standards “best practices” can improve your overall security posture.

Doug Conorich is the global solutions manager for IBM Global Services’ Managed Security Services. Conorich has more than 30 years of experience with computer security holding a variety of management positions.

Emergency Response Session – 3  
Novice/Intermediate/Advanced



## Building and Operating a DR Site: The Total Cost of Facility Ownership

Tad Davies

Bick Group

More and more companies are looking to provide internal solutions to disaster recovery. As such, many companies are now choosing to build their own backup data center.

The type of facility you build will significantly affect long-term operating expenses as well as initial capital costs. The cost of design, construction, maintenance, training and energy are affected greatly by the level of redundancy (reliability) built into the facility. Key to keeping your finances in check is knowing what level of reliability is appropriate for your data center based on your needs. This presentation will discuss the trends we are seeing in the industry and is designed to be a valuable tool for DR facility planners.

Tad Davies is executive vice president of business development with Bick Group. He has 16 years experience concentrating exclusively on the planning, building, and maintenance of mission critical facilities, including data centers and disaster recovery sites.

Advanced Session – 3  
Advanced



## What HIPAA Does Not Give You

Anna Frazzetto

Agility Recovery Solutions

The HIPAA act, specifically the business continuity section, addresses the need to implement a recovery capability in accordance with the act. Unfortunately, those organizations that did not have a recovery program in place before the act was enabled may have

the belief that, after following the HIPAA specifications, that they now have an executable recovery plan. Does having a backup program in place ensure a successful recovery? What is missing from the HIPAA act is the basis for designing a solid, comprehensive recovery program. We will examine what is missing from the HIPAA specifications and the logical steps needed to ensure that you are designing a recovery capability that not only meets HIPAA's requirements but also meets the needs of your organizations to ensure its survival.

Anna Frazzetto is vice president, professional services for Agility Recovery Solutions. She has worked on more than 200 disaster recovery/business continuity programs in her career.

Information Session – 3  
Novice/Intermediate/Advanced



## Professionalism in BCP

This session features an overview of the certification and education programs available from DRI International. DRI has been providing instruction in business continuity planning (BCP) methodology since 1988. Staff and leaders will be on hand to describe course objectives, the process for attaining certification in BCP and other services.

DRII is a recognized leader in providing education, standards, and professional certification. DRII's goals are to create a base of common BCP knowledge through education, assistance, and the development of a resource base; to certify qualified individuals; and to promote the credibility and professionalism of certified professionals.

Strategic Session – 4  
Intermediate/Advanced



**Internal Recovery:  
Is It Right For You?**

Lee  
Payton

As IT infrastructures grow in size and complexity, many organizations are struggling to keep their continuity programs current with their business recovery requirements. This session presents a methodology for examining your existing continuity capability and its requirements, developing economic models of internal vs. external recovery, and identifying the leveragability of test & development, as well as dedicated resources for use in a disaster.

Lee Payton is a founding principal of Corig\*elan, LLC a professional consulting firm specializing in business continuity and high availability where he is responsible for engagement management.

Managerial Session – 4  
Novice/Intermediate/Advanced



**Capturing Business Continuity  
Test Lessons Learned With After  
Action Reviews**

Glenn  
Newkirk,  
CBCP

Info  
SENTRY  
Services,  
Inc.

Testing a business continuity plan faces two major challenges. The first is getting management to commit the attention, time, and resources necessary to carry out a thorough test. The second challenge is capturing lessons learned and test findings from what is often a grueling exercise. This session addresses the second challenge, providing a description for using a research and management technique developed by the U.S. Army, called After Action Reviews (AARs). AARs allow maximum capture and documentation of test results with routine effort. They assist in collecting test data dynamically for lessons learned, findings, and recommendations.

Glenn Newkirk is co-founder and president of InfoSENTRY Services, Inc., headquartered in Raleigh, NC. He directs InfoSENTRY's major business continuity, project recovery, and quality assurance engagements.

Technical Session – 4  
Novice/Intermediate/Advanced



**Communications in Times of  
Crisis: Employee Notification  
and Communication**

Satin  
Mirchandani

MessageOne,  
Inc.

Blaise  
D'Ambrosio

T.Rowe Price

Communications have always played a vital role in the success or failure of businesses. Whatever the role of communications in your organization, insuring their continuity in a time of crisis is key to your organization's ability to recover. Details will be given of the methods currently being utilized at

T. Rowe Price to notify employees and ensure communications continuity in time of crisis.

Blaise D'Ambrosio is vice president, global continuity for T. Rowe Price.

Satin Mirchandani is the chief executive officer of MessageOne, and a member of the MessageOne board of directors.

Emergency Response Session – 4  
Novice/Intermediate/Advanced



**The Quality Sidekick: What  
Every Continuity Planner Needs  
to Succeed**

Richard  
Renaud

PWGS  
Canada



Sarah  
Phillips

PWGS  
Canada

Every hero needs a sidekick and continuity planners are no exception. Organizations worldwide are reaping the benefits of implementing a quality management framework for their day-to-day activities. Learn the eight quality management principles of ISO and the importance of applying these principles in the world of continuity planning, emergency response and disaster management.

Richard Renaud, Public Works and Gov. Services Canada, is responsible for the development and implementation of the ICP and its major component, the EERP and for creating the ICU to produce these plans.

Sarah Phillips is senior project manager, Infrastructure Continuity Unit, Public Works and Government Services Canada.

Advanced Session – 4  
Novice/Intermediate/Advanced



**Triage Assessment of  
Organizational Reactions  
to Disasters**

Rick  
Myer,  
Ph.D.

Duquesne  
Univ.

Richard  
James,  
Ph.D.

Catherine  
Addy

Univ. of  
Memphis

The emphasis in assessment for crisis management and business continuity has traditionally focused on prevention through BIA and risk assessment. Unfortunately, these efforts are not 100 percent successful. In addition to these strategies, a method that assesses organizational reactions in the aftermath of a crisis is needed to enhance BC in the recovery phase. This presentation describes the triage assessment model that can be used to gauge organizational reactions to crises.

Rick Myer, Ph.D. is an associate professor at Duquesne University and co-executive director of Crisis Intervention & Prevention Solutions, Inc.

Richard James, Ph.D. is a professor at the University of Memphis and co-executive director of Crisis Intervention & Prevention Solutions, Inc.

Catherine Addy recently has been developing the Crisis Intervention Team Training program for the Memphis Police Department.

Information Session – 4  
Intermediate/Advanced



**Best Practices**

Ed Devlin,  
CBCP

ES Devlin  
& Assoc.



Jeff  
Dato,  
MBCP

KPMG LLP

Have you ever needed a resource that was an all-inclusive "How to for BCP? Join a collaborative effort to establish industry best practice standards. The DRJ Editorial Advisory Board best practices committee and other industry leaders have joined initiatives with the goal of developing BC Best Practices. Bring your thoughts on "tried and true" methods.

Ed Devlin is a consultant, author, instructor and speaker in the field of business continuity.

Jeff Dato, MBCP, is a senior manager within the risk & advisory services practice of KPMG, LLP.

# Workshop Sessions

## Workshop Session – 1 Intermediate/Advanced



### Connecting the Silos: Pulling It All Together

Many companies have a variety of initiatives to respond to disasters – emergency response, disaster recovery, business continuity and crisis management. However they often operate in a fragmented environment like a row of silos not connected by any common thread.

This lack of connection often result in a silted or jerky response with duplication of effort in some cases and complete oversight in others.

The most effective management of any event requires a well-thought out coordinated response of all of the entities.

This workshop focuses on the necessary assessment and pre-planning that must be done for a smooth transition from response to recovery.

- What are your silos?
- Assess response in each individual effort
- Assess overlaps and holes in response
- Bringing the efforts together

*Regina Phelps, CEM, RN, BSN, MPA is an internationally recognized expert in the field of emergency management and continuity planning.*

*With more than 22 years of experience, she has provided consultation and speaking services to clients in four continents.*

*She is founder of Emergency Management & Safety Solutions, a training and consulting company specializing in emergency management, continuity planning and safety.*

*A partial list of clients include Levi Strauss & Co., Liberty Mutual, Microsoft, IBM, VISA, GATX Capital, Intuit, AMERIGROUP, Macromedia and the IFC/World Bank.*

## Workshop Session – 2 Novice/Intermediate/Advanced



### Best Practices for an Incident Management Plan

For a truly effective and efficient contingency planning program, the disaster recovery plan and the business resumption/continuity plan cannot stand on their own. An incident management plan is needed as the most effective and efficient way to control the situation, save lives and assets, and get your operation back in business as quickly as possible with positive public relations. But what information should be included in a corporate incident management plan? This interactive session will provide attendees with best practices to build into an incident management plan that will manage your business disruption and interface with public sector agencies effectively and efficiently.

This session is presented by PPBI experienced personnel with first-hand knowledge of BC plan activations in emergencies. The presentation of the audit checklist is designed to give participants a way to re-evaluate their plans and measure them against industry best practices. Attend this session to prepare an informal evaluation of your plan. Participants will be responsible for actual plan audits. Discussion and interaction will be encouraged. Come prepared to share and react!

*Dr. Tom Phelan is president, Strategic Teaching Associates, Inc.; training coordinator for PPBI and a member of the DRJ Editorial Advisory Board.*

*Diedrich Towne, CBCP, is security and disaster recovery manager for National Grid, USA and serves as chairman, PPBI Board of Directors.*

*Tom Phelan, Ph.D.*

*Strategic Teaching Assoc. Inc.*



*Diedrich Towne, CBCP*

*Nat'l Grid, USA*

## Workshop Session – 3 Novice/Intermediate/Advanced



### Developing the Recovery Strategy: The Next Step

Following the business impact analysis (BIA), formation of the business recovery strategy is the next logical step in the development of a business continuity program. The results of this effort provide us the infrastructure for carrying out the successful recovery of the organization in case of a disastrous event.

This infrastructure is also the foundation for the procedures that we develop next, a.k.a. our business recovery plan

This session is a former breakout session that has been expanded by popular request to a workshop.

During the workshop we will examine a proven methodology for taking the findings of the BIA and developing successful strategies.

*Barney Pelant holds the certification of Master Business Continuity Professional, with more than 25 years experience in this profession. He is owner and managing director of Barney F. Pelant & Associates, a consulting practice dedicated to business continuity planning since 1991.*

*Previously he was a senior manager serving Ernst & Young's National Business Continuity Program, and director of contingency services, SunGard Recovery Services consulting practice.*

*Pelant serves on the Board of Directors of the Canadian Centre for Emergency Preparedness. He is the past executive director, chair of the Certification Board and member of the Board of Directors of the Disaster Recovery Institute International.*

*Barney Pelant, MBCP*

*Barney Pelant and Assoc.*

Workshop Session – 4  
Novice/Intermediate/Advanced



**Ready, Set, Exercise!**  
**How to Develop and Conduct a Successful Contingency Plan Exercise**

Steven Goldman

Successful crisis management and disaster recovery takes more than a plan: it requires realistic testing and validation. How do you do that properly? Are your exercises smoke and mirrors or do they provide as-close-to-real situations as possible? How does your program compare? How can you improve? During this hands-on workshop, you will learn how to set up and conduct a successful contingency plan exercise. Students will master the aspects of effective exercise preparation and execution, including:

- The scenario team
- Objectives
- Extent of play
- Scheduling and coordination
- Resources and props
- Scenario ideas
- Critiques
- Imagination, creativity, and leadership
- Goldman's highly acclaimed Exercise Planning Checklist.

You will learn how to avoid common pitfalls during the development process and how to anticipate and resolve potential problems that could occur. Exercise evaluation and critiquing methods will also be discussed. With his lively style and real-life examples, Goldman will lead the class through interactive discussions of successful exercise development techniques.

Steve Goldman is a leading crisis management, business continuity, and crisis communications consultant. He has developed, conducted, and evaluated more than 100 drills and exercises, ranging from two-hour table-tops to massive three-day exercises involving several hundred responders. He has more than 25 years experience in all aspects of crisis management.

Workshop Session – 5  
Intermediate/Advanced



**Integrating Disaster Recovery Into Crisis Management**

Michael Keating, CBCP

Crisis Mgmt. Intl.

Crisis management is not about one planning discipline. Some disciplines, such as DR, BCP or crisis communications, are well known, but many others are not. Most companies have a dozen or more people representing different disciplines involved in planning for a crisis, and many of these professionals never talk to each other. Is it any wonder why one of the most common thoughts heard at seminars is the lack of an integrated approach to planning?

This session will detail different disciplines involved in crisis management and how to integrate disaster recovery into a comprehensive program.

The presentation will include interactive exercises with the participants.

*Michael Keating joined CMI in 2003 after nearly four years as the midwest business continuity practice leader for the world's largest risk management firm.*

*He has worked with IBM's Business Continuity and Recovery Services Group, and developed the American Red Cross BICEPP (Business and Industry Council for Emergency Planning and Preparedness) program that taught businesses, non-profits and public entities how to effectively plan for disasters.*

*Additionally, Keating co-wrote BCP course for RIMS, the Risk and Insurance Management Society and authored the Federal Emergency Management Agency course on Continuity of Operations.*

*Keating has presented at conferences and is frequently cited in trade journals.*

*Keating holds a B.A. in business management; is a Certified Business Continuity Professional, a member of the Technical Committee for NFPA Standard 1600 on Disaster Management and was a Nominee for Contingency Planning Hall of Fame in 1997.*

Workshop Session – 6  
Novice/Intermediate/Advanced



**Triage Approach to BCP**

Cheryl Bieson, CBCP

Deucalion

A triage approach is typically associated with a medical system that is employed during a catastrophe, when casualties are high and resources scarce. Victims are separated into those that will survive if given immediate attention, those who will survive without immediate attention, and those that probably won't survive in any case. The result of this dynamic analysis is to deploy scarce resources in a priority order.

This session will present a practical methodology for applying the same type of "triage" approach to enterprise-wide business continuity planning. Starting with the business impact analysis this workshop will present a technique that can be used to apply quantifiable measures to pre-established impact criteria in order to determine business function rankings and corresponding functional priorities. These priorities can then be used to determine the appropriate resource allocations for plan development as well as for response and recovery efforts at time of disaster. A case study organization will be used during the session to demonstrate the triage process and to provide an opportunity to work with the measurement process.

Handout materials that will be provided to complement the session include a copy of the case study, sample metrics and impact criteria as well as charts, diagrams and templates that correlate to utilizing a triage process for BCP.

Cheryl Bieson, CBCP, is a senior partner and founder of Deucalion Inc., a management consulting firm specializing in disaster recovery and business continuity planning. She has provided consulting services and customized training for many organizations such as Nike, Insurance Corporation of British Columbia, Canada Customs and Revenue Agency and State of North Dakota.

# Spring 2004 Registration Form

Sign up by Dec. 18 and receive a \$50 discount! Register By Jan. 7 for \$795!



Date \_\_\_\_\_ List Your CBCP, FBCI, CRP# \_\_\_\_\_  
Mr/Mrs/Ms \_\_\_\_\_ First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
Company \_\_\_\_\_  
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Address \_\_\_\_\_  
City \_\_\_\_\_ Fax Number \_\_\_\_\_  
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Print Name As It Should Appear On Badge \_\_\_\_\_  
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Check here if you require special needs \_\_\_\_\_ • Please specify \_\_\_\_\_  
*Notify conference personnel during Onsite Registration of your arrival and special needs.*

## Industry Information

**Please Indicate Your Industry:** \_\_\_\_\_ Banking/Financial \_\_\_\_\_ Public Utilities \_\_\_\_\_ Transportation \_\_\_\_\_ Insurance  
\_\_\_\_\_ Communications \_\_\_\_\_ Manufacturing \_\_\_\_\_ Government \_\_\_\_\_ Education \_\_\_\_\_ Computer Services  
\_\_\_\_\_ Wholesale \_\_\_\_\_ Health Care \_\_\_\_\_ Petroleum \_\_\_\_\_ Other: \_\_\_\_\_

Rank Your Experience Level \_\_\_\_\_ Novice (less than 2 yrs) \_\_\_\_\_ Intermediate (2-5 yrs.) \_\_\_\_\_ Advanced (5+ yrs.)  
Is This Your First Conference at DRJ? \_\_\_\_\_ Yes \_\_\_\_\_ No

## Payment Information

\_\_\_\_\_ Check enclosed for \$ \_\_\_\_\_ Which Discounts Apply (if any) ? \_\_\_\_\_  
\_\_\_\_\_ Bill my company, Attn: \_\_\_\_\_  
\_\_\_\_\_ Purchase order attached, P.O. # \_\_\_\_\_  
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Cancellation Policy (Must be in writing): Conference enrollment may be cancelled through Feb. 7 without penalty. No refunds or credits will be given for cancellations received after Feb. 7. All no shows will be charged the full amount. All cancellations must be received in writing.

I have read and understand the cancellation policy. \_\_\_\_\_

Promotional Policy: DRJ retains the right to use attendee images and comments for promotional purposes.

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Please complete this section. Circle your session preference. Choose only one session per time slot.

### Sunday, March 7:

Workshop Sessions      SWS-1    SWS-2    SWS-3    SWS-4    SWS-5    SWS-6

### Monday, March 8:

Breakout Session 1      SS-1    MS-1    TS-1    ES-1    AS-1    IS-1  
Breakout Session 2      SS-2    MS-2    TS-2    ES-2    AS-2    IS-2  
Breakout Session 3      SS-3    MS-3    TS-3    ES-3    AS-3    IS-3

### Tuesday, March 9:

Breakout Session 4      SS-4    MS-4    TS-4    ES-4    AS-4    IS-4  
Workshop Sessions      WS-1    WS-2    WS-3    WS-4    WS-5    WS-6

## Registration Rates

Registration rates for the conference are as follows:

- only \$795.00 through Jan. 7
- only \$895.00 through Feb. 6
- only \$995.00 through March 7

Make conference checks payable to Disaster Recovery Journal. All fees must be paid in US currency only and payment must be drawn on a U.S. bank.

## Three Easy Ways To Register

Fax: 314-894-7474  
24-hours a day

Mail: DRJ Registrar  
P.O. Box 510110  
St. Louis, MO 63151

Web: www.drj.com

## For information

(314) 894-0276  
9 am - 5 pm CST  
-or email-  
mercedes@drj.com

## Early Registration Bonus

Register by Dec. 18, 2003 and receive an additional \$50 discount. This bonus applies regardless of any other discounts that have been taken as long as the form reaches our office by Dec. 18, 2003.

## Registration Discounts

Three or more employees from the same company who register at the same time are eligible for a 10% discount. All certified individuals (**must be certified at the time of registration**) are eligible for a 10% discount. All contingency group members are eligible for a 10% discount with proof of membership. These discounts must be requested at the time of registration. No refunds of the discount will be issued, and only one discount per registrant will apply (except Early Registration Bonus).

## Hotel Information

The official conference hotel is:

**Disney's Coronado Springs Resort**  
1000 W. Buena Vista Drive  
Lake Buena Vista, FL 32830  
Reservations: (407) 939-1020

Guests rooms include coffee makers, irons, ironing boards, and wall safes. An expansive pool and several restaurants are also available.

### Hotel Reservations

A block of rooms has been reserved at Disney's Coronado Springs Resort. Once the block is filled, reservations will be made on a space available basis, with the rate subject to change at the discretion of the hotel. The group rate is \$149 for a single room. A \$15 fee will be charged for each additional occupant over 18 years of age. Attendees are responsible for making their own hotel reservations. Call (407) 939-1020, select option #2. The hotel's fax number is (407) 939-1012.



## Travel Tips

### Onsite Shuttle Service

DRJ has arranged for shuttle service between Disney's Coronado Springs Resort's themed villages and the convention center. This convenient service will provide pick-up and

drop-off services at all the villages during designated times.

### Local Transportation

Shuttle service to and from the airport is available through Mears Transportation 24-hours a day for a low fee. Shuttle or taxi service can be arranged for trips to area attractions.

The Walt Disney World Resort Transportation network provides convention guests staying at Disney's Coronado Springs Resort or one of the other Disney properties with complimentary transportation services to all Disney attractions.

### Airline Information

*Airlines:* American Airlines is DRJ's official airlines for Spring World 2004. For reservations, call (800) 433-1790. Use file #A1634AF for the discounted rate.

### Car Rental Information

*Car Rental:* Avis is DRJ's official rental car service. When making reservations call (800) 331-1600 or reserve your car online at [www.drj.com](http://www.drj.com). Use file #D005078 to receive the discounted rate .

### Conference Attire & Climate

The average daytime temperature in Orlando in early spring is in the low 80s with little humidity. Suggested dress code for the conference is business casual, which should include a jacket or sweater. No shorts or jeans please.

## Area Attractions

While in Orlando, make time to visit these exciting Disney attractions and other thrilling tourist sites. During non-conference hours, visit the exciting local attractions. Parks include Disney World's Magic Kingdom, EPCOT Center, Animal Kingdom and Disney-MGM Studios.



For the sports enthusiast, recreation abounds — from tennis and boating to 99 holes of golf and everything in between. Nighttime brings even more excitement. Visit the clubs at Downtown Disney's Pleasure Island or take in shopping, dining and entertainment in Downtown Disney.

Orlando is also home to a variety of other attractions. You can arrange for local transportation to visit Universal Studios, Kennedy Space Center, Busch Gardens, Sea World, Cypress Gardens, the coastal beaches and many more spots.

# • Pre-Conference Courses •

## PRC-1: Terrorism: Establishing an Internal Awareness Program

Saturday, March 6, 8:00 a.m. - 5:00 p.m.  
 Presenter: Anthony Arvish, AJA Consulting  
 \$550 per person

Organizations across the country and around the world have been drawn into the new arena of terrorism and addressing the potential exposure of their organizations to this threat. Business continuity, disaster recovery and threat mitigation efforts all now must incorporate this new threat. But many of these same organizations, due to lack of sufficient resources, are making decisions on addressing their exposure to this threat without first taking the time to fully understand the nature of the threat itself. As with any business-related issue, better decisions are made when the issue at hand is first better understood. Often times, the single most difficult obstacle any organization must overcome in addressing its potential exposure to terrorism is a common understanding and strategy of what should be done, as well as what should *not* be done. Resources are scarce, making correct decisions even more imperative. Good decisions all start with heightened awareness.

This class will provide the framework for establishing an internal education and awareness program for organizations of all sizes, whether public or private.

*Anthony Arvish served as an operations officer in the CIA from 1987-2000. He spent an extensive amount of time working against Islamic-based terrorist groups. Arvish currently works as an independent consultant on counter-terrorism.*



## PRC-2: Emergency Operations Center: The Critical Tool for Event Management

Saturday, 8:00 a.m. - 5:00 p.m.  
 Sunday, 8:00 a.m. - 11:30 a.m.  
 Presenter: Regina Phelps, EMSS  
 \$650 per person

An emergency operations center (EOC) is both a physical place and a way of working during an event. This workshop covers what you need to know to design both the place and the management concept.

- Physical Design Factors
- Incident Command System
- Equipment and Tools
- Who Should be Involved?
- Sustained Operations
  - Communication Concerns and

- Role of Senior Management
- Forms and Processes
- Virtual EOC's

*Regina Phelps is an internationally recognized expert in the field of emergency management and continuity planning. With more than 21 years of experience, she has provided consultation and speaking services to clients in four continents. She is founder of Emergency Management & Safety Solutions, a training and consulting company specializing in emergency management, continuity planning and safety.*



## PRC-3: BCP/DR Projects Made Easy!

Saturday, March 6, 8:00 a.m. - 5:00 p.m.  
 Sunday, March 7, 8:00 a.m. - 11:30 a.m.  
 Presenter: Barry W. Pruitt, PruSpeak  
 \$495 per person

Whether planning emergency response teams, facility drills, an exercise, hot site activation or a BIA, it's a fact – completing projects on time, budget, and with the desired results gives you credibility. This won't be the generic project approach you'll find sponsored in a local hotel – instead get BCP/DR specific information that will help you the minute you get back to work!

Have you struggled getting your project started? Confused by project schedule vs. project plan? Is it a challenge to communicate project issues, risks or status effectively with management? Having challenges negotiating needs? Are projects crucial to your personal success? We'll leap into project management and help you focus on project results because good things happen to those who know how to manage projects.

This training includes tips, tricks, and techniques to get buy-in (even from those not under your control); Define/clarify project goals and mission; Discover planning, scheduling, and organizational tools used by professionals; Practice project monitoring; Know how to set (and meet) milestones...negotiate new deadlines...motivate a team that's losing interest...and what to do when plans change midstream.

*Participants receive a free audio of **Negotiate for All Your Worth** and **An Overview of Project Management** featuring Barry Pruitt.*

*Barry Pruitt has 21 years experience managing projects, teaches train the trainer for project managers internationally and 12 years of project consulting and teaching experience with organizations including Walt Disney, and is an adjunct professor for the USC Business School.*



## PRC-4: Public/Private Partnerships for BCP and Homeland Security

Saturday, March 6, 8:00 a.m. - 5:00 p.m.  
 Sunday, March 7, 8:00 a.m. - 11:30 a.m.  
 \$495.00 per person  
 Presenters: Dr. Thomas D. Phelan,  
 Deidrich Towne, Jr., CBCP

Formerly Fundamentals of BCP/Emergency Management Practices, PPBI has revised this course to more closely meet the needs of business continuity and emergency planners new to the field. Partnering is fundamental to preparedness, response and recovery activities in most business interruptions, but especially in area disasters, terrorist attacks, and potential biological or chemical incidents. PPBI's instructors have first-hand knowledge of declared disasters in both the private and public sectors. This course is a complete introduction of private and public similarities, command posts, cost/benefit analyses, and plan design. The course qualifies for DRII credit toward re-certification.

*Dr. Tom Phelan is president, Strategic Teaching Associates, Inc.; training coordinator for PPBI and a member of the DRJ Editorial Advisory Board.*



*Deidrich Towne, CBCP is security and disaster recovery manager for NationalGrid, USA and serves as chairman, PPBI Board of Directors.*



## PRC-5: Business Continuity Program Management

Saturday, March 6, 8:00 a.m. - 5:00 p.m.  
 Sunday, March 7, 8:00 a.m. - 11:30 a.m.  
 Presenter: Randy Till, CBCP, MasterCard  
 Cost is \$395 or \$600 for both PRC-5 & POC-4

Learn practical and real-life solutions required to establish a business continuity program within your organization. The key to success in moving your BCP program forward is gaining the foothold within your organization's culture and business processes. Till will provide examples, roadblocks that can be overcome and proven techniques using the 18 years of experience and knowledge he has gained implementing business continuity programs within several organizations.

This class will concentrate on the establishment of the BCP program within your organization, covering the steps necessary to setup a program, define a vision and work to gain the necessary support and participation within your company will be discussed in detail. Following best practices in the industry, you will learn how to increase the value of business continuity planning within your organization. Till will share his views on the necessary components and practices required to establish a comprehensive

BCP program and discuss keys to the successful implementation and integration of BCP concepts and practices within your company. This class promises to provide value and insight to the students in attendance.

In addition, each student will receive a free copy of the educational film "Best Practices in BCP" and will be provided with practical and valuable strategies, concepts and methods to support business continuity planning efforts within their organization.

Randy Till, CBCP, is vice president, global business continuity management for MasterCard International.



**BC Planning Made Simple**

Saturday, March 6, 8:00 a.m. - 5:00 p.m.

Sunday, March 7, 8:00 a.m. - 11:30 a.m.

\$450 per person

Presenter: Norman Harris, CBCP, CRP

Tracy Cowan, CBCP, CRP

Since 9/11 what are we most worried about? Network Security? Physical Security? Terrorist Threats? Loss of Critical Staff? Power Outages? Natural Disasters? This interactive class will teach the student everything he/she needs to know to get started on their DR/BCP. Bring your laptop to this class and we will provide you with a CD full of resources, forms and questionnaires to utilize.

Norm Harris will cover the following:

- Risk Assessments Questionnaires
- Network Security Questionnaires
- Development of Core Business Processes

- Recovery Time Objectives
- Time Lines for Recovery
- Development of DR/BCP Teams
- Recovery Tasks
- Impact on Operations
- Resources and Inventory Requirements
- Backup Requirements
- Training
- Plan Maintenance

This unique class is taught by Norm Harris and during the class he will personally assist you with your DR/BC Plan and insure that you have all the tools you need. Come to this class for one-on-one training, but register early.

Norm Harris, CBCP, CRP president & CEO of Harris Disaster Recovery Inc., is a recognized leader in information technology management & disaster recovery.



Tracy Cowan, CBCP, CRP is business continuity/disaster recovery consultant for ICSI Consulting Services, Inc.



**PRC-7: After IT Recovery: What about "HT" (Human Technology)**

Saturday, 8:00 a.m. - 5:00 p.m.

Sunday, 8:00 a.m. - 11:30 a.m.

Presenter: Gerald Lewis, Ph.D.

\$450 per person

Currently, there is great concern about large scale, "man-made" as well as natural disasters that may impact the workplace. However, distinct from the

heightened vigilance around terrorism, and climatic incidents, it has been estimated by the CDC that there are more than 10 million work-related injuries, 7,000 trauma-related deaths, and 1,000 homicides in the workplace each year. The emotional, financial and organizational impact of accidents, robberies, layoffs, violence and other crises is far-reaching. Be it a large-scale or small-scale event, recovery of the infrastructure and IT is essential however, a comprehensive DR/BCP must include a recovery of the "human technology," otherwise, "the lights may be on... but no one is home."

The goals of this program are to provide:

- An understanding of the impact of crises and trauma in the workplace for both individuals as well as the entire organization.
- Education about the reactions of individuals to crises in the workplace;
- Discussion of policies, procedures and programs
- Specific organizational strategies for dealing with a wide range of crises and trauma in the workplace;
- Understanding the post incident stages/phases that continue long after an event and what other interventions and services are relevant for on-going crisis resolution;
- Case examples and/or small group discussion around actual incidents.

Gerry Lewis, Ph.D. is a psychologist practicing in the Boston area. He is an international consultant/speaker who has worked with a wide range of organizations and is also the assistant team coordinator of the MASSPORT (Logan Airport) CISM Team.



**Pre-Conference Course Registration Form**

Complete this form and mail to: Systems Support Inc., PO Box 510110, St. Louis, MO 63151 or fax to (314) 894-7474. Make check payable to Systems Support Inc. or provide credit card information.

- \_\_\_\_\_ PRC-1: Terrorism: Establishing An IAP (\$550)
- \_\_\_\_\_ PRC-2: EOC: The Critical Tool (\$650)
- \_\_\_\_\_ PRC-3: BCP/DR Projects Made Easy (\$495)
- \_\_\_\_\_ PRC-4: PPBI:Public and Private Partnerships (\$495)
- \_\_\_\_\_ PRC-5: Business Continuity/Program Management (\$395)
- \_\_\_\_\_ PRC-6: BC Planning Made Simple (\$450)
- \_\_\_\_\_ PRC-7: After IT Recovery - What About HT? (\$450)

Check enclosed for \$ \_\_\_\_\_ Check # \_\_\_\_\_

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Cancellation Policy (Must be in writing): Course enrollment may be cancelled through Feb. 7, 2004 without penalty. No refunds or credits will be given for cancellations received after Feb. 7, 2004. All no shows will be charged the full amount. All cancellations must be received in writing.

# • Post-Conference Courses •

## **POC-1: From A to Z: Designing the Successful Exercise**

Wednesday, March 10, 1:30 p.m. - 5:30 p.m.

Thursday, March 11, 8:30 a.m. - 5:00 p.m.

\$650 per person

Presenter: Regina Phelps, EMSS

Do you have a plan but have not yet tested it? You might discover that your document is less than sufficient. There is really only two ways to find that out. One is to have an actual disaster; the other is to do an exercise. The workshop details everything you need to do to design a successful exercise from the ground up!

- Five Types of Exercises
- Exercise Design Team
- Development of Exercise Plan
- Selecting & Training a Sim Team
- Rules of Exercise Facilitation
- Participate in Two Advanced Tabletop Exercises
- Develop the Outline for Your Own Tabletop Exercise

*Regina Phelps is an internationally recognized expert in the field of emergency management and continuity planning. She is founder of Emergency Management & Safety Solutions, a training and consulting company specializing in emergency management, continuity planning and safety.*



## **POC-2: Best Practices and the BIA**

Wednesday, March 10, 1:30 p.m. - 5:00 p.m.

Thursday, March 11, 8:30 a.m. - 5:00 p.m.

Friday, March 12, 8:30 a.m. - 11:30 a.m.

\$695 per person

Presenter: Barry Pruitt, PruSpeak Inc.

Michael Herrera, CBCP, MH & Assc.

This technical workshop is a hands-on consultative approach of leading participants through the BIA process. You'll gain cutting edge material including best practices from around the world. Learn:

- How to Complete a BIA
- Tips, Traps, and Pitfalls in a BIA
- Suggested BIA Tools
- How to Identify Risks & Leverage Results
- Advice on How to Best "Sell" the BIA
- Identify Your Audience
- Be Prepared to Deal with Upper Management "Cross Examination" of Your BIA.
- Identify the Tasks, Timelines and Put Information Into an Internationally Accepted Project Format

20

Take home a participant workbook and BIA questionnaire sample on disk. Plus get BIA project consultation and advice on any existing timelines you have. Bring your BIA!

Participants receive an audio of "Negotiate for All Your Worth" and "An Overview of Project Management," featuring Michael Herrera and Barry Pruitt.

*Barry Pruitt has 21 years experience managing projects, teaches 'train the trainer' for project managers and has 12 years of project consulting and teaching experience.*



*Michael Herrera, CBCP, is the managing principal of MH & Associates Consulting. He has over 15 years technology and business experience and recovery experience.*



## **POC-3: Emergency Command Basics**

Wed., March 10, 1:30 p.m. - 5:00 p.m.

Thurs., March 11, 8:00 a.m. - 5:00 p.m.

\$495 per person

Presenters: Dr. Thomas Phelan

Deidrich Towne, CBCP

PPBI is combining three critical topics into one action-packed, interactive course at the request of our members.

The course will be divided into three topics:

- Command Post Operations
- Introduction to Incident Command System
- Responding to the Media

The course is for both private and public command posts or emergency operations centers.

*Dr. Tom Phelan is president, Strategic Teaching Associates, Inc.; training coordinator for PPBI and a member of the DRJ Editorial Advisory Board.*



*Deidrich Towne, CBCP is security and disaster recovery manager for NationalGrid, USA and serves as chairman, PPBI Board of Directors.*



## **POC-4: BC Implementation and Validation**

Wednesday, March 10, 1:30 - 5:00 p.m.

Thursday, March 11, 8:00 a.m. - 5:00 p.m.

Presenter: Randy Till, CBCP, MasterCard

\$395 per person or \$600 for both POC-4 & PRC-5

Numerous examples, practical experiences and real-life solutions required to implement various

components of a business continuity program are outlined in this course. Students will be provided with concepts and techniques associated with assessing risks and how to determine impacts associated with business disruptions. Time will be spent discussing the approach and best practices for emergency response and crisis management plans required to initiate and manage the recovery process. The class will review the planning steps and processes associated with business and system recovery planning. Special emphasis will be placed on the exercising of recovery plans and the need to evaluate recovery readiness results, then reporting findings to management. Management commitment and participation is a key factor in the success of your program. Till will share techniques on how to engage the management and staff within your organization. Experienced or new business continuity planners will be sure to walk away from this class with techniques and concepts that will help their organizations.

In addition, each student will receive a free copy of the educational film "Best Practices in BCP" and will be provided with practical and valuable strategies, concepts and methods to support business continuity planning efforts within your organization.

*Randy Till, CBCP, is vice president, global business continuity management for MasterCard International.*



## **POC-5: How To Mitigate and Manage Crisis Dysfunction**

Wednesday, March 10, 1:30 p.m. - 5:00 p.m.

Thursday, March 11, 8:00 a.m. - 5:00 p.m.

\$495 per person

Presenter: Ted Buffington, Achievement by Design

This skills-based, hands-on workshop is an intermediate to advanced level course for organizational crisis and recovery team members. It is designed to give participants a new paradigm from which to operate, develop, replicate and sustain high performance response and recovery teams. Participants will learn the formal Team Engineering™ model for organizing teams, getting buy-in, delegating action items, and handling conflicts.

Day one is strategic and provides a solid foundation for understanding how to implement the Team Engineering™ model in any 'team' related situation. Day two is tactical and is designed as a "train the trainer" format to insure each participant can replicate the skills used immediately back at work.

Participants will be introduced to distinctions of language, and behaviors of highly effective managers, leaders, coaches and facilitators.

Participants will be able to use the skills and processes immediately back at the workplace.

*Ted Buffington is an internationally recognized researcher, lecturer, trainer and consultant in the field of human behavior and motivational psychologies. He is CEO of Achievement By Design, a research & consulting organization specializing in high performance teams.*



this workshop, you will develop the first draft of a recovery plan for your own company. This is a seminar for those who must develop the skills to manage their disaster recovery plan.

You will learn how to prepare an in-depth emergency response plan and by the end of the seminar, you will have a draft of your first plan to take back to your office.

*Jeff Williams is president and chief strategist for Binomial International Inc. and DisasterRecovery.com Inc.*



For this reason, successful businesses have discovered the value of creating a standardized process and policy which lowers the risk of emotions stopping production or rising to the level of litigation. Without a clearly defined strategy, policy and procedure which is written into clear expectations, there is nothing to fall back on in a crisis.

This workshop will present astonishing numbers to show how even a well contrived gossip chain can cost millions to a company. Cost-effective ways to stop such "spinning" at your worksite will be discussed. The range of human emotions which show up at work will be reviewed, as well as the means that businesses should employ to create a top-rung, value-added policy model for employee continuity.

This presentation will offer an overview of well-tested concepts. It will provide practical and usable tools from well respected traditions in mental and medical health as well as business management paradigms.

*Dr. Vali Hawkins-Mitchell is a licensed mental health counselor, with a doctorate in health education. She is a well published writer and has served as a trauma counselor at the World Trade Center disaster.*



**POC-6: Outrageously Easy Recovery Planning**

Wed., March 10, 1:30 p.m. - 5:00 p.m.  
 Thurs., March 11, 8:00 a.m. - 5:00 p.m.  
 Friday, March 12, 8:00 a.m. - 11:30 a.m.  
 \$795 per person  
 Presenter: Jeffrey Williams, Binomial and DisasterRecovery.com Inc.

This workshop is a special presentation of the very popular seminar that normally costs \$2,091 and has been given around the world. Topics include the reasons for planning; the parameters of recovery planning; security; how to do a TRA, a BIA and a risk analysis; how to determine critical processes; what alternate methods are available; how to select recovery strategies; the importance of records management; offsite storage; and much more.

Included is a fully-registered copy of the Phoenix Disaster Recovery Planning System. At

**POC-7: Creating a Spin-Free Workplace: The Training Workshop**

Wed., March 10, 1:00 p.m. - 5:00 p.m.  
 Thurs., March 11, 8:00 a.m. - 5:00 p.m.  
 \$500 per person  
 Presenter: Vali Hawkins Mitchell, Ph.D, LMHC

An interactive, hands-on, high-energy workshop providing the process and tools for self care and management of emotions in the workplace, ranging from daily annoyances to catastrophic trauma recovery for individuals and systems.

Businesses and emotions in the workplace are like oil and water. They do not mix well. When human feelings interrupt individual or collective productivity, a significant fiscal liability can quickly evolve.

Keeping people working is the key to productivity.

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- POC-7: Creating A Spin Free Workplace (\$500)

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See page 16 for  
registration information

