

• 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

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- ____ 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

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-5: How To Mitigate and Manage Crisis Dysfunction (\$495)
- POC-6: Outrageously Easy Recovery Planning (\$795)
- POC-7: Creating A Spin Free Workplace (\$500)

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