

CONFERENCE AT A GLANCE

Saturday

8:00 a.m. - 5:00 p.m.	PRC-1: BCP Management Course*
8:00 a.m. - 5:00 p.m.	PRC-2: Risk: Assess/Protect Course*
8:00 a.m. - 5:00 p.m.	PRC-3: EOC The Critical Tool Course*
8:00 a.m. - 5:00 p.m.	PRC-4: Incident Management Course*
8:00 a.m. - 5:00 p.m.	PRC-5: BCP Made Simple Course*
8:00 a.m. - 5:00 p.m.	PRC-6: Ready Set Exercise Course*

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

Sunday

8:00 a.m. - 11:30 a.m.	PRC-1: BC Management Course
8:00 a.m. - 11:30 a.m.	PRC-2: Risk: Assess/Protect Course
8:00 a.m. - 11:30 a.m.	PRC-3: EOC The Critical Tool Course
8:00 a.m. - 11:30 a.m.	PRC-4: Incident Management Course
8:00 a.m. - 11:30 a.m.	PRC-5: BCP Made Simple Course
8:00 a.m. - 11:30 a.m.	PRC-6: Ready Set Exercise 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

6:30 a.m. - 6:30 p.m.	Cyber City Open
6:45 a.m. - 8:00 a.m.	Networking Breakfast co-hosted by MessageOne
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
5:30 p.m. - 6:30 p.m.	Product Demonstrations
6:30 p.m. - 8:30 p.m.	Hospitality

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Tuesday

6:30 a.m. - 6:00 p.m.	Cyber City Open
6:45 a.m. - 8:00 a.m.	Networking Breakfast co-hosted by MessageOne
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
3:00 p.m.	Exhibit Hall Closes
3:00 p.m. - 5:30 p.m.	Workshop Sessions

Wednesday

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: BC Implementation**
1:30 p.m.	POC-2: Best Practices & the BIA**
1:30 p.m.	POC-3: Designing the Exercise**
1:30 p.m.	POC-4: IC for Business/Industry**
1:30 p.m.	POC-5: Reasonable Precautions**
1:30 p.m.	POC-6: Easy Recovery Planning**
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.



Sunday Workshop Session 1

Novice/Intermediate



BCP-101

Session Limited to 100 participants

Ed Devlin, CBCP

ES Devlin & Assoc.



Norm Harris CBCP CRP

Harris Recovery Solutions

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 their 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 is a consultant, author, instructor and speaker in the field of business continuity. Devlin is a Certified Business Continuity Planner, a member of the Disaster Recovery Journal Executive Council and a member of the Advisory Board of the National Association of Contingency Planners. From 1973, when he co-founded Devlin Associates, to the present time, Devlin has assisted over 400 companies throughout the world in the development or enhancement of their business continuity and business resumption programs.

Norm Harris, Certified Recovery Planner, chairman, president and CEO of Harris Recovery Solutions is recognized as a leader in information technology management and disaster recovery. Harris co-founded CRISIS Magazine, one of the first disaster recovery publications and HSH, Inc., which became the largest disaster recovery consulting company in the US. For the last 25 years, Harris has consulted with thousands of business clients in every major industry

Sunday Workshop Session 2

Novice/Intermediate/Advanced



Channel 7 is in the Lobby! Industrial Strength Crisis Communications Workshop

Steve Goldman



Judy Hirsch

SBG & Assc.

Many disasters have shown that even with a great technical response, if you have a poor communications response, your overall actions will be judged as poor. Thus, an integral part of any disaster response is the communications plan.

During this hands-on workshop, you will understand what to expect during your crisis and have the essentials to write or upgrade your own crisis communications plan. Students will master the aspects of effective crisis communications planning and response, including:

- Why poor crisis communications will hurt your otherwise excellent plans
- Why the media act that way
- What the media will do to you
- Essential elements of your crisis communications plan
- Organizing your communications response team
- Who should and should not be your spokesperson
- Notification strategies – who's on first?
- How a terrorism incident may change everything
- Channel 7 is here – now what?
- How to conduct a press conference
- Taming the PR and media beasts

Students will also participate in an interactive disaster walk-through and press conference.

Steve Goldman is a leading crisis communications, business continuity, and crisis management consultant.

Judy Hirsch is a former reporter/journalist with more than 12 years experience in commercial broadcast and print media.

Sunday Workshop Session 3

Novice/Intermediate/Advanced



BIA Workshop Business Impact Analysis Beginning to End

Barney Pelant, MBCP

Barney Pelant & Assc.

The Business Impact Analysis (BIA) project is the logical first step in the development of a business continuity program.

The project provides the business rationale for disaster recovery and business continuity planning.

A BIA can help an organization to learn their current capability to recover from a disastrous event. Also, the BIA can help validate that the plan in place is really meeting the organization's business needs.

During this workshop we will examine the successful methods for achieving timely desired results.

We will cover asking the right questions to learn:

- What is most important? Why?
This workshop will be interactive, so bring your questions and come share your experiences!
- This speaker will also present a detailed workshop on Tuesday.

Barney Pelant, MBCP, is owner and managing director of Barney F. Pelant & Associates, a consulting practice dedicated to business continuity planning since 1991.

He holds the certification of Master Business Continuity Professional from DRI International. Pelant's technical experience ranges from the design and development of domestic and international business centers, to the development of contingency plans to ensure their ongoing viability.

In 1991, he launched his own practice dedicated to business continuity planning and development.

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 two to five years; and advanced for those in the industry for more than five years.

Sunday Workshop Session 4

Novice/Intermediate



Exercising and Maintaining the DRP

Harlan
Dolgin,
CBCP

This workshop consists of an interactive presentation followed by a tabletop simulation, with participation expected by all attendees. The presentation will review the methodology of exercising your disaster recovery plans and identify key components of what the disaster recovery plan should contain.

There will also 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.

Following the presentation materials, there will be an active simulation for all participants. Participants will be divided into groups of 10 or less, and they will be given a scenario that will damage a fictitious building operated by the group.

They will then analyze the facts presented and develop a plan to react to the situation. 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 is BCP/DR manager for the operations and technology department at Reuters. He began working in the business continuity field in 1997 at Mercantile Bank (now a part of U.S. Bancorp) as a network administrator with disaster recovery responsibilities for the NT and Novell environments.

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 Blue Cross and Blue Shield of Missouri (now a part of WellPoint Health Networks) in March 2001, with responsibility for revitalizing their business continuity and disaster recovery program. Dolgin became a Certified Business Continuity Planner in March 2001. 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, Mo. He has maintained his law license with the State of Missouri.

Sunday Workshop Session 5

Novice/Intermediate



Matching Cost-Effective DR Strategies to Continuity Requirements

David
Edborg

Corigelan
LLC

In today's rapidly expanding computing environments it has become increasingly difficult to both cost effectively provide continuity solutions for business processes and to quickly react to new requirements. This workshop will include a worksheet based methodology to help continuity practitioners rapidly assess an application's needs and quickly develop a strategy for providing cost-effective continuity coverage.

In this workshop, learn how to dissect an application's recovery requirements into fundamental building blocks of data protection schemes, equipment provisioning, and hosting options. Once dissected, you will apply appropriate techniques to solve for each of the building blocks. And then once assembled, a checklist set of tests can be applied to your developed model to check for adequate coverage.

In this workshop you will be provided with the methodology, worksheets, and checklists that you can take home and apply to your continuity practice.

David Edborg is the director of high availability solutions for Corigelan LLC. Prior to his work at Corigelan, Edborg was the solution design manager for Comdisco's Advanced Recovery & Storage Solutions Division.

Edborg has implemented high availability and internal recovery solutions for many of Fortune's top 500 Companies, including companies in the following verticals: manufacturing, financial services, retail, application/internet hosting, insurance and banking.

Before joining Comdisco, Edborg held various positions at Computer Associates where he gained significant commercial software development experience in the areas of NCSC approved computer security software and enterprise management software.

Sunday Workshop Session 6

Novice/Intermediate/Advanced

Mock Disaster Simulation – Facing Today's Challenges

Sponsored by



Session Limited to 200 participants

As the potential threats to organizations and the cost of major disruptions spiral upward, many business continuity professionals are faced with the responsibility of validating business continuity and emergency response plans and developing effective response teams. They must often accomplish this with limited budgets and lack of experience in using one of the most effective validation and training tools – the exercise.

Take advantage of this opportunity to learn how to protect your company and its assets by participating in this exacting simulation. Participants will leave this session with the necessary tools and knowledge to conduct cost effective and meaningful exercises within their own organizations. This event is limited to the first 200 registrants. Register early!

This disaster exercise will be an interactive hands-on experience designed to instruct while challenging critical thinking skills and encourage decision making under pressure. This event will provide attendees with a unique opportunity to apply the full range of their experience and expertise as they participate in a realistic multi-hour simulation and debriefing.

Workshop and Exercise Leadership Team:

Larry Kalmis, FBI, Virtual Corporation project executive, Margaret Langsett, executive vice president, Virtual Corporation, Phyllis Rendino, account manager, Virtual Corporation and other members of the Virtual Corporation team.



GENERAL SESSIONS



Past keynote speakers have entertained and enlightened our general session audiences.

On Monday, Tuesday and Wednesday mornings, general sessions are held for all attendees. These sessions are keyed to contingency planners of all experience levels.

Experienced keynote speakers will share their knowledge through laughter, case studies and lessons learned.

Find the information and answers you've been looking for!

General Session 1
8:15 a.m. – 9:15 a.m.

MONDAY



Tim Gard, CSP

Lessons Learned and Laughter: Your Key to Using Humor in the Workplace

In the stressful world of business continuity, humor can have a positive effect, but when misused, it can have an equally negative effect. Discover how humor can give you the guidelines crucial to harnessing humor as a practical skill. Gain key insights on using humor in today's fast-paced, diverse contingency planning workplace. You'll also learn how to steer clear of the negative humor that may become a source of problems and complaints.

Tim Gard, CSP, blends his unique experiences as a student, sailor, state welfare worker/investigator, federal employee, salesman, factory worker and small business owner into a dynamic, hilarious, good humor program

General Session 2
9:30 a.m. – 10:30 a.m.



Ken Smith

Using Availability Risk Management to Unlock the Full Potential of Your Information Availability Program

When examining current programs to identify the impact of technology decisions on Availability, many organizations choose to start from a technology standpoint. Opting instead to start from a risk management standpoint can empower organizations to make better-informed decisions. Learn the need for better risk analysis, how to quantify availability risk, how to define an availability risk management program, and how a holistic approach to enterprise-wide availability can help unlock the mystery of gaining executive support.



Ann Pickren

SunGard
Availability
Svcs.

Ken Smith is executive vice president of strategy & software for SunGard Availability Services,

Ann Pickren is senior vice president, software development for SunGard Availability Services.

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

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Joe Theisman

Challenges of Change: Building a Solid Playbook

Drawing from personal experience, Joe Theisman knows how to deal with the "Challenge of Change." On Nov. 18, 1985, he was on top of his game – a two-time Pro Bowl player and the most productive player in the history of the Washington Redskins. Later that evening, he found himself in a hospital bed with a compound fracture to his leg, shattering both his career and his boyhood dream. At age 35, he was faced with starting over his personal life and professional career. In this stirring presentation, individuals and organizations learn how to tackle change by keeping a positive mental outlook and committing to a vision that guides you to the top.

Joe Theisman is a color analyst for ESPN. During his 12-year NFL career, Theisman was a two-time Pro Bowl player and the winning quarterback in Super Bowl XVII. He was named the league's MVP in 1983.



Barry
Pruitt

PruSpeak

Oz ...You Had What You Needed All Along!

The wonder of making things happen in BC/DR is challenging! Resource requests, BCP projects, funding and even our jobs are viewed as non critical – until the disaster occurs – then your organization goes into panic mode, employees become confused, we have a reaction, the press is looking over our shoulder, and finally the event is over. Gain key strategies to protect your organization. This session will build your confidence and help you create positive outcomes by addressing the perceptions, principles, and process of using your skills – and why not? You had what you needed all along!

Barry Pruitt is president of PruSpeak Inc. PruSpeak offers consulting and many topics including "Project Management," "Best Practices and the BIA," "Presentation Skills," and "The Art of the BIA Interview."



Steven
Roberts

Nat'l Law
Journal

Critical Infrastructure Protection and Business Continuity

As a country that depends on the safe and reliable function of critical infrastructures, the owners and operators of the nation's 13 critical infrastructure sectors have a special homeland security responsibility. This presentation provides an overview of business continuity as it relates to critical infrastructure protection. Topics that are covered include: background and definitions, threats and vulnerabilities, business continuity case study, business continuity implementation strategies for critical infrastructures, and the growing legal obligation to implement a business continuity plan for the critical infrastructure.

Steven Roberts is the homeland security columnist for the National Law Journal, a guest instructor at the United States Department of Homeland Security's Federal Law Enforcement Training Center in Glynco, Georgia, and a Policy Associate for the Internet Security Alliance.



Mark
Vanston

Hewlett-
Packard

Corporate Governance and Business Continuity

As government regulations, in particular Sarbanes-Oxley and HIPAA, continue to drive the creation of corporate governance groups, business continuity (BC) plays a critical role in the risk mitigation of government regulatory requirements. During this session, Vanston will explore the interaction and synergies that exist in meeting regulatory obligations, as well as look at the operational efficiencies that can be gained by taking a proactive stance towards future legislation.

Mark Vanston is the senior strategic principal for Hewlett-Packard's Business Continuity & Availability Services. In this role, he is responsible for aligning solutions with customer needs and defining future strategic offerings.



Regina
Phelps

Emer. Mgmt &
Safety Sol.

Effective Event Management Using a Time-Tested Model

During any major incident, company's not only have to manage the event but often find themselves dealing with a plethora of difficult internal issues. What if someone told you there was a time-tested system that could provide you with one plan that was effective using an all hazards approach? What if you learned about a process that was standardized across the country and was proven to be effective? Learn about the incident command system (ICS) and how it can provide your company with clear guidelines for incident management.

Regina Phelps, CEM, RN, BSN, MPA is an internationally recognized expert in the field of emergency management and continuity planning. She is founder of Emergency Management & Safety Solutions.



Chris
McDaniel

Mutual
Service Corp.

Swarm Of The Century: Surviving and Thriving in the Worst FL Hurricane Season On Record

During the 2004 Hurricane Season, a record breaking four storms hit Florida. Two of the four were direct hits on Mutual Service Corporation, requiring the execution of MSC's disaster preparedness plans and the evacuation of facilities twice within a single month. Learn how the plan was successful in helping to ensure information availability, and the lessons learned. It will also explain how two major disasters were turned into the most financially successful month for MSC in all of 2004.

Chris McDaniel, senior vice president and chief information officer of Mutual Service Corporation (MSC), is responsible for all technology functions, and provides leadership to joint technology projects undertaken by the Pacific Life Network of Broker/Dealers.



Dr. Steve
Timmons,
CBCP

BearingPoint
Consulting

Holistic Organizational Survival Planning: Coming Full Circle

Organizations today face a new reality: the scope, type, and frequency of disaster events is increasing at an exponential pace. The traditional approach of technology-based DR planning falls far short of integrating all the necessary elements. Historically, planning efforts have focused on the "presence of a plan" - the assumption was made that a company was prepared for a crisis event. This approach resulted in a false sense of security. Today, BC planners must look beyond the presence of a plan and re-focus on the true "viability of the program".

Dr. Steve Timmons is a doctor of psychology and the global practice leader of enterprise survival planning for BearingPoint Consulting, with more than 20 years of leadership experience in human capital leadership and consulting, organizational survival planning, organizational psychology, and human resource management.



Strategic Session 1

Novice/Intermediate/Advanced



Continuity Planning at a Strategic Level: Across CBK Domain Approach

Dawn Shook

Given today's volatile environment, security has become almost a mantra for management. Recent events have driven home the necessity of designing and implementing resilient systems and processes. However, despite the new focus on security, approaches are still fragmented. Learn how the risk management process crosses multiple security domains. Discussion will include the risk management process from a strategic level, including identification of key assets and critical processes, planning, and selection of mitigation options. The conclusion will include suggestions for implementing a cross-domain approach to continuity planning.

Dawn Shook is an associate with Booz Allen Hamilton's Risk Management Team. Her experience with Booz Allen includes critical infrastructure protection planning, disaster recovery test, plans, and documentation, continuity of operations plan development, requirements analysis, total cost of ownership studies and gap analysis.

Managerial Session 1

Intermediate/Advanced



Let RTO run your BCP program

David Morgan

This presentation will zero in on the definition of RTO/RPO and how you can use these key indicators to drive your business continuity program. RTO and RPO are elements that can be used to convince management to fund BCP strategies. They can help IT understand the connection between what the business needs and what IT delivers in disaster recovery scenarios. You should leave this session with a clear definition and some key examples of how you can use RTO and RPO in your business continuity program.

With Zenith Insurance Company for 15 years, David Morgan has had responsibility for the corporate business continuity plan (BCP) for the past 13 years. The company is made up of 38 business units in 21 locations. He has had responsibility for the maintenance and testing of the BCP and the development of the new business unit business impact analysis and integration into the corporate plan.

Technical Session 1

Novice/Intermediate/Advanced



Damian Walch

IBM BRCS

Recovery Strategy

Businesses continue to review how they want to recover their data centers after a significant outage. As their business requirements change, they need to modify and enhance their current solutions. The IT organizations need to provide their business clients with alternative solutions that meet business needs and that can be cost justified. This session will discuss what factors should be included in the analysis of whether to continue with a vendor recovery strategy or whether to implement a self-recovery strategy. It will also discuss what technical recovery solutions could be implemented as part of either strategy.

Damian Walch is responsible for managing the national consulting practice for IBM's Business Resilience and Continuity Services. This includes business continuity, information security and high availability services.

Emergency Response Session 1

Novice



Pamela L. Crowe, CBCP

EDS

Emergency Response 101

How prepared are you? How prepared is your company? Can you survive the first hour of a disaster in the workplace? This session is designed to raise your awareness of what you could be missing, and how that could impact you, personally, and your company during those first few hours of a disaster. This session will also address how to be proactive in many areas that could save time, money, and lives, when disaster strikes. We will also look at what every company should know: insurance requirements, salvage and restoration, damage assessments, contact lists and more.

Pamela L. Crowe has been involved in business continuity activities for more than 14 years. As a business continuity planner, she was responsible for the BC/DR plans and training of employees at seven manufacturing sites in the Southeast. She is currently the IT business continuity manager for a large telecommunications company in Atlanta. Crowe also volunteers with the Red Cross Disaster Services as a government liaison officer to the state and local EMA during disasters and drills, and is a certified Red Cross Disaster Instructor.

Advanced Session 1

Advanced



Randy Till



Maureen Stauber, CBCP

MasterCard Intl.

Advanced Recovery Planning Techniques Associated with Technology Recovery Plans

This session will present some of the advancements made at MasterCard International related to the development and testing of recovery plans for mission critical systems. Learn some of the key areas where technology innovations along with creative planning have led to improved recovery capabilities and readiness. The transition from the standard DRP philosophy toward BC and operational resiliency has led to the realization of value-added benefits for MasterCard International. This session will provide insights learned during this transitional process.

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

Maureen Stauber, CBCP is MasterCard International's director of global business continuity management for technical recovery.

Information Session 1

Novice/Intermediate/Advanced



Tom Serio

Office Depot

Not Another Hurricane! A Case Study of the 2004 Hurricane Season in Florida

This presentation covers the preparation and recovery of not one hurricane, but four hurricanes of varying degrees that hit Florida during August and September 2004. Luckily hurricane warnings allow for proactive and timely preparation. Still, many lessons were learned from the events and will be shared with the attendees. Focus will also be on employee issues, from damaged homes to those that want to come back to work but the office is closed. Also, how does a company support employees whose lives were significantly impacted, either by loss of home, injury, or loss of income? This presentation will include steps on disaster awareness and how to better educate employees on proactive measures.

Tom Serio is the business continuity manager for Office Depot Inc, in Delray Beach, Fla., responsible for the BCP efforts for the domestic and international business lines. He has been in the IT/business field for more than 20 years, in operations and management, with a focus on DR/BCP for more than 10 years.



BREAKOUT SESSIONS 2

Monday, 2:45 - 3:45 p.m.

Strategic Session 2

Novice/Intermediate/Advanced



Next Generation Continuity Planning: Simpler and More Effective

Carla Blum During 2004 Motorola completely revised its BC program so it is simpler and easier to implement. This presentation will review Motorola's experience and will discuss how other companies might apply this approach to their own operations. We will discuss a short-form BIA with a straightforward test for criticality; standard process maps designating operations presumed to be business-critical; two bottom-line criteria for setting recovery time objectives; a checklist for suppliers; and an eight-step continuity plan. The complete program guide and other materials used by Motorola will also be shared with participants.

Carla Blum is the manager of business continuity and crisis management at Motorola. She is responsible for helping to develop and teach programs and exercises for business continuity and crisis management to our teams worldwide.

Managerial Session 2

Intermediate /Advanced



Managing a Business Continuity Plan Development Project

Virginia M. Miller, CBCP This presentation will walk participants through the steps of managing a business continuity plan development project from both the technical and business perspectives. It will address project scoping, task delineation, and hours estimating for conducting a business impact analysis, risk assessment, recovery strategy design, plan development and recovery team training. It will also address managing executive expectations, conducting presentations as well as common pit falls and lessons-learned from successfully managing more than 30 BCP projects.

Virginia Miller is currently with TwoSeven, Inc. and has more than 20 years experience in the IT profession. She has provided information security and business recovery consulting services internationally to Fortune 100 companies, the U.S. Department of Defense, the U.S. Department of Transportation, and the New York City Transit Authority.

Technical Session 2

Intermediate/Advanced



Creating Information Technology Recovery Plans

Scott L. North, CBCP Information technology (IT) is one of the key areas to include in any business continuity plan. For the average BCP employee with a limited knowledge of IT, this can be an intimidating task. Using an organized, project management approach, this session helps to define the major components of the plan, issues to be addressed, and staff required in order to produce a working and testable IT recovery plan. The attendee will leave with tangible ideas and templates on how to create this critical component of their overall business continuity plan.

Scott North is a senior manager of information security and business continuity for First Charter Bank, with more than 18 years of practical experience, mostly in the financial services industry. He received his MBA from the University of North Carolina at Charlotte in 1981.

Emergency Response Session 2

Novice/Intermediate



Implement Business Continuity for Minimal Cost

Ray Castellano Do you need a governance strategy in your organization to facilitate the business continuity planning process? Are you frustrated by the cost and complexity of business continuity solutions? Learn how to quickly implement business continuity solutions in your organization – regardless of its size. See an organization's business continuity planning process and learn how to provide the information and data executives are concerned about processes? In this session, you will also learn to gather the data you'll need to increase the confidence that your organization can survive the unexpected.

Ray Castellano is a principal at Public Service Enterprise Group, an energy and energy services company headquartered in Newark, NJ. Castellano has worked at PSEG for 24 years and has held numerous positions in the information technology department.

Advanced Session 2

Advanced



Initiating Business Continuity Planning for Terrorism Threats Facing Every Organization

Robert C. Chandler, Ph.D. In the aftermath of 9-11, awareness of the risks of terrorism against corporate and public targets in North America has grown exponentially. Analysis on terrorist vulnerabilities and risks have begun in many work rooms, but there remains too few standard approaches to such preparation. 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. This session will feature a short film on best practices that is appropriate for senior managers, executives, and all employees in your organization.

Robert C. Chandler, Ph.D. is the Blanche E. Seaver Professor of Communication and chair of the communication division at Pepperdine University. He is a recognized expert on organizational systems, human factors during organizational crises, and organizational communication assessment.

Information Session 2

Novice /Intermediate/Advanced



Certificates, Credentials, and Degrees: The Education and Training of BCP and Emergency Management Professionals

Dr. Thomas D. Phelan Numerous academic, private and public certifications are becoming commonplace. What are the issues and challenges facing education and training organizations, and what are the implications for business continuity planners and emergency managers? There is some resistance amongst veteran first responders who are unimpressed with classroom training replacing years of on-scene experience as the best way to prepare emergency management or disaster recovery leaders. We'll examine the best practices and explore the standards, certification and accreditation programs paving the way in the post 9/11 world.

Dr. Thomas D. Phelan, president, Strategic Teaching Associates, Inc., is a founding member of the U.S. Department of Homeland Security. Dr. Phelan was named to the IBM Worldwide Crisis Response Team in 2002.



Strategic Session 3

Novice/Intermediate/Advanced



Solving the Puzzle: Making Sense of Mass Notification Features & Benefits

Patrick Stuver

National Notification Network

With the latest highly-functional mass notification systems, you may feel like you need a decoder ring and a cheat sheet to figure out which features are mission-critical, must have, or important to have, and which features will make your system a valuable "everyday" operational tool. Join us as we crack the code and explain both what's available and which features will best fit your organization. In this interactive session, we will define everything from abstract concepts to commonly used terms in mass notification and help determine what YOU need when it comes to formulating or improving your BC/DR plan.

Patrick Stuver is a partner and founder of National Notification Network (3n). He is a co-author of the widely circulated white paper "CRM Markets and Strategies: An Everse Approach."

Managerial Session 3

Novice/Intermediate/Advanced



Compliance and Operational Recovery

Jerry Montella

Mail-Gard

Companies need to be aware of how they manage their print and mail operations relative to regulations such as GLB, HIPAA and Sarbanes-Oxley. With federal regulations like these to comply with, it's more important than ever to have a recovery process in place that works, not just on paper, but a tested and documented print and mail recovery plan. This session will provide information on how to analyze processing, infrastructure, current backup capabilities, recovery and restoration plans and will give you valuable insight into determining your company's risk and the best options for your recovery solution. Information on how to manage costs and meet regulatory compliance, even if print/mail operations are outsourced will be reviewed.

Gerald A. Montella serves as general manager of Mail-Gard. In this position, he is responsible for developing and managing the company's sales and marketing activities, including advertising, trade shows, direct sales and independent sales representatives.

Technical Session 3

Novice/Intermediate/Advanced



Continuity/Recovery Planning for a Distributed Environment

Alan Hughes

TSYS

Disaster recovery in a mainframe world has its own pitfalls, but planning for BC and DR in a distributed environment brings a host of new challenges. Disparate hardware and software, linked over LANs, MANs, and WANs, backed up by various backup software, with differing procedures and timing, with different support personnel for each component makes recovery planning for the distributed environment more complex than for centralized systems. There are practices, all with their own implications, that can help to mitigate the risk inherent in distributed systems. This session will discuss the issues, risks, and procedures involved in BC/DR for distributed systems.

As a director of application development for TSYS, Alan Hughes is responsible for directing the development of a web-based product for major credit card issuers, including related recovery and security issues.

Emergency Response Session 3

Novice/Intermediate/Advanced



E-mail -The Critical Business Application: It Will Fail - What You Need to Know to Keep it Running

Satin Mirchandani

MessageOne

For DR professionals, e-mail is the single biggest application nightmare. By 2005 an estimated 16 billion business messages will be sent daily in the U.S. alone – clearly e-mail has emerged as the most mission-critical application used throughout all areas of the enterprise. Its importance to the organization has made the need to maintain e-mail and to prevent e-mail outages one of the leading DR challenges. E-mail must not fail – but the reality is that e-mail does, and will fail, and as a DR professional it is essential to know how to keep it running, no matter what. This session will cover the latest research on why e-mail fails, and discuss the technology and preparation necessary to ensure e-mail continuity.

Satin Mirchandani is the chief executive officer of MessageOne, and a member of the MessageOne Board of Directors. He is responsible for the overall leadership and strategic direction of the company. Mirchandani has been actively involved in the development of MessageOne since early 2001.

Advanced Session 3

Advanced



Understanding the Alternatives for Extending Storage Area Networks

Tom Nosella

Cisco

Regulatory requirements and business economics are making business continuance solutions mandatory for enterprises. Expert estimates indicate that storage capacity for the IT industry is growing an estimated 49 percent annually. Because stricter government regulations are demanding longer data retention and because greater amounts of data are being generated through business automation, this growth trend is likely to continue. To accommodate the vast amounts of data needed throughout enterprises, many IT organizations are switching from direct-attached storage to storage-area networks (SANs). The presentation will examine the myriad of SAN extension technologies available to IT administrators today with and will explain how they can best match the most appropriate technology according to the business and technical requirements of their organizations.

Thomas Nosella is director of technical marketing within the Internet Switching Business Unit, now responsible for the development and marketing for Cisco's storage networking solutions since the completion of the Andiamo Systems acquisition. Thomas and his team are responsible for the creation, validation, and promotion of Cisco Storage Networking designs and solutions for Cisco's enterprise and service provider customer base.

Information Session 3

Novice/ Intermediate



Professionalism in BCP

This session features an overview of the certification and education programs available from DRI International. DRII 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.



BREAKOUT SESSIONS 4

Tuesday, 1:30 - 2:30 p.m.

Strategic Session 4

Novice/Intermediate/Advanced



Hearing A Dial Tone When The Wind And Rain Die-Down

Errol Olivier

Companies continue to invest in educational programs and technologies for disaster recovery and response. One area given a majority of the attention has been communication, specifically emergency response communications. Using an IP-based satellite network for restorative communications provides personnel with a robust system for uninterrupted communications in the most extreme circumstances. With satellite, communications can be up and running in a matter of hours. Hear an overview of the technology, explore situations where the technology is applicable and learn about the use of satellite for restorative communications in the 2003 California Wildfires.

Errol J. Olivier is the president of CapRock and is responsible for the global operations of the company. He has more than 20 years of oil and gas service company experience, 18 years of telecommunications experience and serves on the board of directors of CapRock Communications.

Managerial Session 4

Novice/Intermediate/Advanced



The Changing World of Business Continuity and Disaster Recovery for Healthcare Organizations

Kathy Lee Patterson, CBCP

Most healthcare organizations have taken great strides over the last several years to develop viable business continuity and disaster recovery programs. Every industry has its challenges, and this presentation will address how to overcome many of the challenges associated in developing or improving BC/DR Programs for healthcare organizations from first-hand knowledge. Learn practical advice and tested tips for fine tuning a hospital BC/DR program including conducting a business impact analysis, initiating policies that work, compliance issues, getting buy-in from management and changing the culture of your environment.

Kathy Lee Patterson is a Certified Business Continuity Professional, specializing in disaster recovery planning for healthcare institutions. Currently, she is the business continuity and disaster recovery manager at the Temple University Health System in Philadelphia, PA.

Technical Session 4

Novice/Intermediate/Advanced



The Role of Virtualization in Highly Available Architectures and for Business Continuity

Tim Coats

“Virtualization” is one of the new industry buzz words. The product and service offerings built around it are changing the way IT does business. Virtualization touches everything from the data storage to business level processing. But virtualization also adds another architectural and operational level to those processes that protect the business from disruptive events. This presentation reviews the various virtualization techniques to develop a conceptual frame work for deploying virtualization to support highly available architectures and BC strategies. The scope includes application for both local and remote recovery scenarios.

Tim Coats is a business continuity solutions global program manager for EMC with more than 15 years in high technology development and deployment. He has assisted a variety of clients in the financial, healthcare, and manufacturing industries.

Emergency Response Session 4

Novice/Intermediate/Advanced



Surviving the 2004 Hurricane Season

Felix Liard

During the 2004 hurricane season, Ned Davis Research Group, comprised of two affiliates, Ned Davis Research, Inc. in Venice, Fla. and Davis, Mendel & Regenstein in Atlanta, Ga. declared a disaster three times. With clients in more than 30 countries relying on essential information on financial markets, the firm needed to be prepared. They needed to instill confidence with customers, mitigate risk and develop a framework for accelerating growth and promoting a competitive advantage. Luckily they worked with a service provider to build and rehearse a comprehensive approach. Learn about the importance of having an updated BC plan; what it means to declare a disaster; the impact the declarations had on customers and the experience of declaring three times giving “practice-practice-practice” a new meaning. Discussion will include a step-by-step plan that helped the firm act quickly and appropriately when the hurricanes hit.

Felix Liard is systems administrator, Ned Davis Research Group (NDRG). He has 24 years of experience with Information Technology.

Advanced Session 4

Advanced



Advanced Networking Session

- Session registration is limited to 150.
- Designed for planners with 7 years minimum experience

This session will focus on issues relevant to continuity professionals with seven or more years of experience. Discussion will include pressing issues that face more experienced planners as they work to bring business continuity and enterprise-wide planning to the forefront of their organization. Topics to be covered include industry regulations, professional practices, legal requirements, selling DR to upper management and more. This session will do more than just scratch the surface. Be prepared for an in-depth study of the critical components affecting advanced planners. Bring your questions and your answers and participate in this groundbreaking opportunity to network with other advanced planners.

Members of DRJ's Editorial Advisory Board will facilitate this session.

Information Session 4

Novice/Intermediate/Advanced



Mass Exodus: The Movement of Data Off-Site

Frank Brick

As businesses continue to face rising storage management costs and increasingly stringent regulations for data protection and accessibility, the value of remote data protection continues to grow. In turn, the mass exodus of data now underway is only just beginning. It's likely that off-site backups and outsourced data protection services will become the cornerstone of a new generation of business continuity and disaster recovery plans that promise cost-effectiveness and convenience. In this presentation, learn how far outsourced off-site data protection has come, and answer some of the critical questions that IT executives should ask when considering a service.

Prior to joining Arsenal Digital Solutions in April 2001, Frank Brick held the position of CEO at Telxon Corporation (now Symbol Technologies), a \$450 million publicly traded company in the mobile-wireless computer systems industry. Brick has also held various management and technical positions at Matrix Information and Directory Services, Exxon Office Systems and IBM.



TUESDAY WORKSHOPS

3:00 p.m. - 5:30 p.m.

Workshop Session 1

Novice



Bob Mellinger

The Disaster Experience

This simulation will put you in the throes of a real-life disaster situation – as it unfolds. You will make critical decisions and deal with the consequences of those decisions! Chances are that while you read this, an unexpected disaster is causing an organization stress and confusion and is affecting its long-term ability to provide products and services to its customers. Are the organization's leaders prepared to handle it? Will they be able to recover?



Cheryl Burress

Attainium Corp.

Business continuity planning has never been more critical to the long-term success and survivability of organizations than today, regardless of their size, location, industry, or revenue. However, creating and maintaining a business continuity plan (BCP) still remains low on the priority of organizations' leadership.

Billions of dollars in productivity, revenue, and ill will between customers and organizations are lost every year as a result of disasters and companies' inability to respond to them appropriately. This session has been designed to put you in the throes of a real-life disaster situation, as it unfolds. You will make the critical decisions any organization will have to make – and deal with the consequences of those decisions! After you've finished, you'll understand the importance of planning in advance for a disaster or other business disruption. You'll never want to be caught unprepared again!

Bob Mellinger is the founder and president of Attainium Corp, which he launched to deliver business continuity, disaster recovery and crisis management services.

Cheryl Burress is the director of outreach for Attainium Corp. This includes the coordination of all of the sessions, workshops, keynote speeches and disaster simulations produced and delivered by the Attainium.

Workshop Session 2

Novice/Intermediate



John Kauffman

Hartford Financial Services Group

How Much is Enough: Insurance, That Is?

This presentation provides an overview of common insurance program elements that business continuity planners should consider in preparing for significant business impacting events. The discussion reviews the different coverage areas of property, crime, electronic data processing (EDP), inland marine, business income, automobile, general liability, product liability, umbrella, and workers' compensation.

The workshop includes a case study, where participants break into teams and try to determine the appropriate insurance programs for the scenario presented. Results are presented to the class for discussion.

John Kauffman is currently the director of loss control training for The Hartford Financial Services Group, in Hartford, Conn. He has more than 25 years in the loss control field. He has worked as a loss control field consultant and home office loss control resource in the areas of general liability, products liability and public entities before accepting his current position. Kauffman provides training programs for Hartford clients, agents/brokers, and loss control field staff. He has been a speaker at numerous national and regional professional conferences and symposiums. He has had articles published in professional safety and public risk magazines. Kauffman has also been quoted in numerous other publications.

Kauffman holds the following certifications: Certified Safety Professional (CSP), Certified Business Continuity Professional (CBCP), Associate in Risk Management (ARM), and Associate in Loss Control Management (ALCM).

Kauffman holds a BS in fine arts education and a BA in business administration from Indiana University of Pennsylvania. He also holds a Certificate in Occupational Safety from the University of California, Irvine.

Workshop Session 3

Novice/Intermediate/Advanced



Regina Phelps

Emer. Mgmt. & Safety Solutions

Develop an Infectious Disease Component to Your Business Continuity Plan

The recent failure of our worldwide vaccination manufacturing system gives you an idea of how fragile the infectious disease response system is in this country. With the threat of Avian influenza looming on the horizon, it only heightens the importance of disease planning for your company. This current disease threat is coupled with the fluid nature of our world ... everyday up to 2 million people worldwide cross international borders; each year 1.5 billion people travel on commercial airplanes and the United States hosts 47 million visitors. Today, using the service of an aircraft, the SARS virus, avian influenza or any other pathogen can be virtually anywhere within 48 hours.

This workshop will discuss the history of disease outbreaks over the past 100 years, the current state of disease outbreaks in the world, current suggested practices and the components of an effective infectious disease plan.

- Surveillance at your company
- Assessment
- Preparedness
- Vaccination programs
- Emergency response
- Communications
- Training and exercises

Attend this informative session to find out what you or your company should be doing to be ready for the next global disease outbreak!

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, training and consulting company specializing in emergency management, continuity planning and safety.

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 two to five years; and advanced for those in the industry for more than five years.

Workshop Session 4

Novice/Intermediate/Advanced



Developing the Recovery Strategy: The Next Step

Barney Pelant, MBCP

Once the business impact analysis (BIA) has been completed, the next logical step in the development of a business continuity program is the formation of the business recovery strategy.

Barney F. Pelant & Assc. The results of this effort provide us the infrastructure for carrying out the successful recovery of the organization in case of a disastrous event or business interruption.

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.

Learn important and logical steps to take when structuring the business recovery strategy. You'll take home answers and solutions that you can implement immediately.

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.

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.

He helps organizations in all industries and professions to develop and carry out business continuity programs.

He is a frequent public speaker and provider of training seminars and workshops on business continuity planning and development.

Workshop Session 5

Novice/Intermediate/Advanced



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

Steven Goldman

SBG&A 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 crisis plan exercise. Students will master the aspects of effective exercise preparation and execution, including:

- The scenario team
- Scope and objectives
- Extent of play
- Scheduling and coordination
- Resources and props
- Scenario ideas
- Critiques
- Imagination, creativity, and leadership
- Goldman's 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 more than 25 years experience in all aspects of crisis management, including BCP program management, plan development, crisis communications, training, exercises, and audits.

Workshop Session 6

Intermediate/Advanced



Building Psychological Infrastructure in Today's Color-Coded World

George Everly, Ph.D.



Brian Flynn, Ed. D.



Susan Flanigan, CBCP

Human Continuity

Reports have emphasized the importance of an immediate psychological response to crises, disasters, and even terrorism. In the wake of critical events such as mass disasters and terrorism, more than 45 percent of those exposed may benefit from psychological strategies and services. The goal of terrorism is to inflict psychological injury but the private sector must be psychologically prepared for all hazards, from power outages to workplace violence. Education and training on how to develop and sustain psychological infrastructure in the workplace is long overdue. This presentation will provide attendees with a basic overview of relevant disaster psychological information and best practices regarding an all-hazards approach to critical events. Attendees will consider their roles as workers, parents/family members, and citizens and how to develop a foundation of good coping skills, decision-making strategies and simple psychological preparedness techniques. The speakers will unveil their "Seven Strategies for Psychological Preparedness" and provide links to tools and resources for understanding human behavior under stressful conditions and guidance on how to create a personal safety plan.

George Everly, Ph.D., Brian Flynn, Ed.D. and Susan Flanigan, CBCP, are the founding directors of Human Continuity, a consulting firm specializing in psychological infrastructure for business continuity and continuity of operations programs.