Continuity of Operations Planning (COOP) for Nonprofits

September 10, 2020
1:00 to 2:30pm

A Zoom-based Webinar for UASI South Bay Hub
Welcome

• Welcome and Introductions
  – Housekeeping
  – Zoom basics and etiquette

• Why We Are Here
  – Fourth session in a series of workshops for South Bay
  – Funded by Bay Area UASI
Session Objectives

• What is COOP and why is it important

• Explore key planning elements and learn how to improve your agency’s readiness and resilience

• Dialogue with other nonprofits and learn from one another’s planning efforts
Agenda Overview

1. Welcome and Introductions
2. Current events reflection
3. COOP – what is it and why
4. Digging deeper into COOP planning
5. CBO perspectives and tips
6. Q&A
7. Next Steps and Closing Remarks
REFLECTION

1. What do you wish you knew last March before the pandemic hit us?

2. What do you wish you had planned for before the lightning fire complexes broke out last month?
SHARING REFLECTIONS
Agency Emergency Planning
Hierarchy of Organizational Preparedness with Emergency Planning Elements
# Emergency Planning Elements that Support Each Tier of Organizational Preparedness

<table>
<thead>
<tr>
<th>Tier 1-Life Safety and Survival Actions</th>
<th>Tier 2- Re-establishing Operations and Service Delivery</th>
<th>Tier 3- Sustaining Operations and External Collaboration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. PERSONAL PREPAREDNESS</strong></td>
<td><strong>A. DISASTER MISSION STATEMENT</strong></td>
<td><strong>A. COORDINATION WITH OTHERS</strong></td>
</tr>
<tr>
<td>- Essential for everyone—if people aren’t prepared, they can’t help.</td>
<td>- Do this early on in your planning</td>
<td>- Who else is in your building?</td>
</tr>
<tr>
<td>- Offer training such as first aid, CPR</td>
<td>- Assume you can’t do everything</td>
<td>- Who’s in your neighborhood?</td>
</tr>
<tr>
<td>- Encourage and procure resources</td>
<td>- What do you intend to focus on?</td>
<td>- Who do you connect with at city and county levels, CBO networks, contractors</td>
</tr>
<tr>
<td><strong>B. EMERGENCY COORDINATION TEAM</strong></td>
<td><strong>B. ESSENTIAL SERVICES</strong></td>
<td><strong>B. DISASTER SPECIFIC AGREEMENTS/MOU'S</strong></td>
</tr>
<tr>
<td>- Identify team that leads your response (ICS or other model)</td>
<td>- Describe services that need to continue or be quickly restored</td>
<td>- With cities and County Op Area</td>
</tr>
<tr>
<td>- Identify positions and duties in advance</td>
<td>- Note any differences from normal operations</td>
<td>- How will resources be coordinated</td>
</tr>
<tr>
<td><strong>C. EMERGENCY PROCEDURES</strong></td>
<td><strong>C. ESSENTIAL ADMINISTRATIVE FUNCTIONS</strong></td>
<td>- Reimbursement or contracts for services</td>
</tr>
<tr>
<td>- Evacuation / Alternate Sites</td>
<td>- What is needed to support essential services delivery?</td>
<td><strong>C. VITAL RECORDS AND COST RECOVERY</strong></td>
</tr>
<tr>
<td>- Shelter in Place / Supplies</td>
<td>- Consider payroll, check signing, supplies, emergency spending procedure, etc.</td>
<td>- Focus on records needed to support essential functions</td>
</tr>
<tr>
<td>- Hazard-specific plans (e.g. Fire / Flood / Hazardous Materials / Active</td>
<td><strong>D. COMMUNICATIONS</strong></td>
<td>- Track disaster-related direct costs, personnel time and volunteer hours</td>
</tr>
<tr>
<td>Shooter, etc.)</td>
<td>- Who do you need to communicate with</td>
<td></td>
</tr>
<tr>
<td><strong>D. EMERGENCY ALERT AND NOTIFICATION</strong></td>
<td>- What methods or tools will be used</td>
<td></td>
</tr>
<tr>
<td>- Staff and volunteer contact rosters</td>
<td><strong>D. DONATIONS</strong></td>
<td></td>
</tr>
<tr>
<td>- Client/consumer outreach info &amp; policy</td>
<td>- Plan for monetary donations</td>
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</tr>
<tr>
<td>- What systems and tools will be used (e.g. Alert/SCC/Everbridge/Facebook/</td>
<td>- Plan for donations of goods and/or services to support essential services</td>
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<tr>
<td>Groupme)</td>
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<tr>
<td><strong>E. RESILIENT FACILITIES</strong></td>
<td><strong>E. STAFFING AND VOLUNTEERS</strong></td>
<td></td>
</tr>
<tr>
<td>- What facilities will you need to use?</td>
<td>- Plan staffing needs, shifts, rotations, etc.</td>
<td><strong>E. RECOVERY PLAN</strong></td>
</tr>
<tr>
<td>- Have they been assessed for resilience?</td>
<td>- Plan to involve volunteers, if appropriate</td>
<td>- Plan for continued staffing &amp; volunteers</td>
</tr>
<tr>
<td>- What mitigation tasks should you tackle?</td>
<td>- Job descriptions for spontaneous volunteers</td>
<td>- Plan for transition back to normal operations</td>
</tr>
<tr>
<td><strong>F. HAZARD AND RISK ASSESSMENT</strong></td>
<td><strong>F. SUCCESSION PLANNING</strong></td>
<td></td>
</tr>
<tr>
<td>- What types of disasters might occur?</td>
<td>- For coverage when individuals are unable to perform their essential duties</td>
<td><strong>F. TRAINING AND EXERCISES</strong></td>
</tr>
<tr>
<td>- What are your vulnerabilities?</td>
<td>- Plan for timely filling of vacancies</td>
<td>- Train leadership and let them practice</td>
</tr>
<tr>
<td>- How will these impact services?</td>
<td></td>
<td>- Exercise with government and other entities</td>
</tr>
</tbody>
</table>

Original concept and content created by Margaret Meish 2015; revisions by Margaret Meish and Anna Swardenski February 2016
What’s the Difference

DISASTER RESPONSE PLANNING
- Tactical in nature
- Emergencies short in time period
- Response activities during a fire, EQ, flood at the time the disaster is HAPPENING
- ALERTSCC, CERT, Red Cross

CONTINUITY OF OPS PLANNING
- Strategic in nature
- Gets the organization up and running
- Focuses on contraction of services and structural impacts
- Helps organization return to operations with minimal resources
What is a COOP

A documented, trained and tested plan that helps your organization continue providing essential services with limited resources under very duress situation

The COOP will answer the following question –

“In the event of (pandemic/fire/power outage), how will you and your colleagues continue to provide services and care for your organization’s clients?”
• Tier 3 – Fulfilling A Broader Community Role

- MOUs
- Coordination with Others
- Donations
- Training and Exercise
- Vital Records
- Recovery Plan

• Tier 2 – Re-establishing Operations and Service Delivery

- Disaster Mission Statement
- Essential Services
- Essential Administrative Functions
- Communications
- Staffing and Volunteers
- Succession Planning

• Tier 1 – Life Safety and Survival Actions

- Personal Preparedness
- Emergency Coordination Team
- Emergency Alert and Notification
- Emergency Procedures
- Resilient Facilities
- Hazard Assessment

Hierarchy of Organizational Preparedness

Emergency Planning Elements
Tier 1 – Life Safety and Survival Actions

- Does your physical environment support your safety?
### Tier 1 – Life Safety and Survival Actions

- **Does your physical environment support your safety?**

### Emergency Coordination Team

- **Emergency Alert and Notification**

### Emergency Procedures

- **Resilient Facilities**

### Resilient Facilities

- **Hazard Assessment**
## Tier 1 – Life Safety and Survival Actions

<table>
<thead>
<tr>
<th>Personal Preparedness</th>
<th>Emergency Coordination Team</th>
<th>Emergency Alert and Notification</th>
<th>Emergency Procedures</th>
<th>Risk Management Planning</th>
<th>Hazard Assessment</th>
</tr>
</thead>
</table>

- Identify the hazards and threats your organization faces and assess their impact
## Tier 1 – Life Safety and Survival Actions

- Identify the hazards and threats your organization faces and assess their impact.

### Emergency Coordination Team

- Emergency Alert and Notification

### Emergency Procedures

- Resilient Facilities

### Hazard Assessment

- Hazard Assessment Worksheet

#### Hazard and Risk Assessment Worksheet

<table>
<thead>
<tr>
<th>Hazard</th>
<th>A. Likelihood of occurrence</th>
<th>B. Potential impact on facility or organization</th>
<th>C. Potential impact to clients and staff</th>
<th>A + B + C</th>
<th>Priority for planning</th>
<th>High priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active shooter</td>
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<td>Flood</td>
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<td>Earthquake</td>
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<td>Extreme cold</td>
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<td>Extreme heat</td>
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<td>Flooding</td>
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<td>Loss of fuel</td>
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<td>Loss of property</td>
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<td>Loss of power</td>
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<td>Loss of sanitation</td>
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<td>Loss of water</td>
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<td>Loss of water</td>
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<tr>
<td>Natural disaster</td>
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<td></td>
</tr>
<tr>
<td>Threats</td>
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</tbody>
</table>

### Personal Preparedness

- Hazard Assessment

#### Attachments

- Emergency Planning Guide for CBOs

- Hazard and Risk Assessment Worksheet

- Resilient Facilities

- Emergency Coordination Team
Tier 1 – Life Safety and Survival Actions

| Personal Preparedness | Emergency Coordination Team | Emergency Alert and Notification | Emergency Procedures | Resilient Facilities | Hazard Assessment |

**USING THE CHATBOX – Tell us...**

1. Who works from home in this COVID-19 environment?
2. What hazards do you face in your home office environment during earthquake? PSPS?
3. How can you reduce/eliminate the threat?
4. What “alternate facility” arrangements are in place for your organization?
Alternate Facilities

Keep in mind when determining an alternate location

• How much space is needed
• Location and traffic patterns or needs
• Security needs or issues
• Special needs like refrigeration, HIPPA compliant record storage, wifi/internet access...etc
Alternate Facilities (2)

The process for executing use of an alternate facility is what goes in your COOP.

1. Notify alternate facility that you will be relocating to that site
2. Deploy a team to set up the alternate facility
3. Notify staff who will be working at the alternate facility
### Step 9: Alternate/Temporary Location

Determine if it is possible to set up an alternate or temporary location if your primary site is unavailable. Would this site become your new primary site? Do you have multiple locations in which you can condense work operations? How much work can be done virtually? Does your nonprofit have options for relocation in the same park? Would a work-from-home strategy work for your organization? What pre-agreements would you need for these options?

<table>
<thead>
<tr>
<th>ALTERNATE LOCATION</th>
<th>SECOND ALTERNATE LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>STREET ADDRESS</td>
<td>STREET ADDRESS</td>
</tr>
<tr>
<td>CITY, STATE, ZIP CODE</td>
<td>CITY, STATE, ZIP CODE</td>
</tr>
<tr>
<td>TELEPHONE NUMBER</td>
<td>TELEPHONE NUMBER</td>
</tr>
<tr>
<td>IS THERE A PRE-AGREEMENT IN PLACE?</td>
<td>IS THERE A PRE-AGREEMENT IN PLACE?</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>POINT OF CONTACT</th>
<th>POINT OF CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTACT NAME</td>
<td>CONTACT NAME</td>
</tr>
<tr>
<td>TELEPHONE NUMBER</td>
<td>TELEPHONE NUMBER</td>
</tr>
<tr>
<td>ALTERNATE NUMBER</td>
<td>ALTERNATE NUMBER</td>
</tr>
<tr>
<td>E-MAIL ADDRESS</td>
<td>E-MAIL ADDRESS</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>SITE ASSESSMENT</th>
<th>SITE ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>NUMBER AND TYPE OF STAFF TO WORK HERE</td>
<td>NUMBER AND TYPE OF STAFF TO WORK HERE</td>
</tr>
<tr>
<td>SUPPLIES ALREADY IN PLACE</td>
<td>SUPPLIES ALREADY IN PLACE</td>
</tr>
<tr>
<td>SUPPLIES THAT WOULD BE NEEDED</td>
<td>SUPPLIES THAT WOULD BE NEEDED</td>
</tr>
<tr>
<td>TIME TO SET UP OPERATIONS</td>
<td>TIME TO SET UP OPERATIONS</td>
</tr>
<tr>
<td>LENGTH OF TIME TO STAY IN THIS SITE</td>
<td>LENGTH OF TIME TO STAY IN THIS SITE</td>
</tr>
<tr>
<td>POSSIBLE HAZARDS IN THE AREA</td>
<td>POSSIBLE HAZARDS IN THE AREA</td>
</tr>
</tbody>
</table>

| NOTES: | NOTES: |
Hierarchy of Organizational Preparedness

- **Tier 1 – Life Safety and Survival Actions**
  - Personal Preparedness
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- **Tier 2 – Re-establishing Operations and Service Delivery**
  - Disaster Mission Statement
  - Essential Services
  - Essential Administrative Functions
  - Communications
  - Staffing and Volunteers
  - Succession Planning

- **Tier 3 – Fulfilling A Broader Community Role**
  - MOUs
  - Coordination with Others
  - Donations
  - Training and Exercise
  - Vital Records
  - Recovery Plan

Emergency Planning Elements
Graphic Organizer Tool

- Planning Gap
- In Progress
- Complete

Hierarchy of Organizational Preparedness
Tier 2 – Re-establishing Operations and Service Delivery

Disaster Mission Statement

- Defining the role you plan to play in a disaster becomes the foundation of all planning work that follows

PARTICIPANT POLL #3
Disaster Mission Statement (DMS) Examples

**Example from a children's organization with multiple sites:**

In the event of a disaster, ABC leaders will be there to assist and offer shelter to all children attending the program until each one of them is accounted for, found, or have been relocated to a shelter/hospital if needed.

**Example from an organization that primarily feeds the homeless:**

1. Ensure safety and status of staff, volunteers, clients on-site.
2. Ensure clients in residential programs are safe. Check their status and assist as needed.
3. Treat and/or refer people with emergency medical needs.
4. Establish a temporary communications and assistance center (information and referral for clients, volunteers, donors, and others).
5. Establish food program as soon as possible.

**Example from a multi-site, residential housing organization:**

Protect the lives of our employees, program residents, participants of our services, and visitors.

**Continue ABC operations and service delivery to the extent possible.**

The order of priorities are:

- To ensure the safety of staff, participants and volunteers on-site at the time of and immediately following the event, and to assist in accessing medical attention, as needed.
- Continue to provide residential participants continued safe and supportive shelter and housing following the event.
- Assist non-residential participants in their efforts to access safe emergency shelter or housing, as needed.

**Example from a foundation and church operating under the same roof:**

In a disaster, ABC Foundation/ARC Church will maintain hope and aid the community by providing emergency services; short-term shelter, food, and health and mental health services.

**Example from a mobile meal service provider with outreach to homebound individuals:**

- Strive to ensure the well-being of staff and volunteers as they are essential in our ability to respond to client needs.
- Continue operations and service delivery to the extent possible.
- Services will be prioritized:
  1. Most critically ill/homebound first.
  2. Those with mobility issues.
  3. Community needs.
Tier 2 – Re-establishing Operations and Service Delivery

- Meeting the needs of the people you serve
Tier 2 – Re-establishing Operations and Service Delivery

Disaster Mission Statement

Essential Services

Essential Services
Meeting the needs of the people you serve.

Consult your organization’s Disaster Mission Statement for its mission and priorities in the aftermath of a major disaster. Expand here on specific services that are essential.

Essential services are those that must continue at all cost.

- List the essential services you will continue to provide following an emergency.

- What are the critical material resources necessary to maintain these services?

- Will you be able to continue to provide the same services or will services be limited?

- Could you provide additional services or know who could?

- Will the number of clients/consumers that you serve increase or decrease in an emergency?

- What additional supplies will be needed (e.g., bedding, medicine, special equipment, etc.)? Where can you get these items?

Remember: Knowing your priorities as an agency makes everything else fall into place. In crisis or opportunity, if you are clear on your priorities you can make the best decisions for your agency.
## Tier 2 – Re-establishing Operations and Service Delivery

### Essential Administrative Functions

- What is needed to support essential services delivery?
Tier 2 – Re-establishing Operations and Service Delivery

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**Disaster Mission Statement**

**Essential Administrative Functions**

**Essential Services**

**Staffing and Volunteers**

**Succession Planning**

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**Emergency Planning Guide for CBOs**

**Essential Administrative Functions**

What administrative services must be maintained or preserved to provide the essential services you outlined in your Disaster Mission Statement?

- Human Resources/Payroll
- Check signing
- Accounts Payable and Accounts Receivable
- Information Technology / MIS / Website
- Security
- Purchasing
- Emergency spending and reimbursement procedures
- Public information/Media
- Staffing an Emergency Operations Center
- Other administrative functions?

**Table 5: Essential Functions and Contacts**

<table>
<thead>
<tr>
<th>Essential Function</th>
<th>Primary Contact</th>
<th>Alternate Contact</th>
</tr>
</thead>
</table>

- How will the essential services be maintained or preserved?

- On what internal and external services, supplies, units, and vendors does each function depend?

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Tier 2 – Re-establishing Operations and Service Delivery

- How will you communicate and coordinate?
Tier 2 – Re-establishing Operations and Service Delivery

Communications

Disaster Mission Statement

Essential Services

Essential Administrative Functions

Staffing and Volunteers Succession Planning

• How will you communicate and coordinate?
## Tier 2 – Re-establishing Operations and Service Delivery

<table>
<thead>
<tr>
<th>Disaster Mission Statement</th>
<th>Essential Services</th>
<th>Essential Administrative Functions</th>
<th>Communications</th>
<th>Succession Planning</th>
<th>Staffing and Volunteers</th>
</tr>
</thead>
</table>

- Plan to appropriately recruit, task and manage volunteers
### Tier 2 – Re-establishing Operations and Service Delivery

#### Succession Planning

<table>
<thead>
<tr>
<th>Disaster Mission Statement</th>
<th>Essential Services</th>
<th>Essential Administrative Functions</th>
<th>Communications</th>
<th>Staffing and Volunteers</th>
</tr>
</thead>
</table>

- Have a leadership back-up plan
### Leadership Succession Plan

Have a leadership back-up plan.

The **Emergency Coordination Team section** identifies your response team and their alternates to ensure staffing. In this Leadership Succession Plan section, you identify the succession plan for your executive team and board officers. Indicate to whom their responsibilities and powers will be delegated if they are not available.

#### Executive Team Member

<table>
<thead>
<tr>
<th>Executive Team Member</th>
<th>Delegate</th>
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</table>

#### Board Officer

<table>
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<tr>
<th>Board Officer</th>
<th>Delegate</th>
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If you are part of a larger organization, the succession information may already be available in another document. Reference incorporation or other legal documents that may already assign powers.

- Are the Orders of Succession for other key positions for the agency, including but not limited to administrators, regional or field directors, key managers, other key essential personnel or their equivalent positions, identified and current?

- Does the agency conduct annual training on the roles and responsibilities for personnel involved in the succession order? For key Agency personal? For Agency heads?
Hierarchy of Organizational Preparedness

- **Tier 1** – Life Safety and Survival Actions
  - Personal Preparedness
  - Emergency Coordination Team
  - Emergency Alert and Notification
  - Emergency Procedures
  - Resilient Facilities
  - Hazard Assessment

- **Tier 2** – Re-establishing Operations and Service Delivery
  - Disaster Mission Statement
  - Essential Services
  - Essential Administrative Functions
  - Communications
  - Staffing and Volunteers
  - Succession Planning

- **Tier 3** – Fulfilling A Broader Community Role
  - MOUs
  - Coordination with Others
  - Donations
  - Training and Exercise
  - Vital Records
  - Recovery Plan

**Emergency Planning Elements**

- **Graphic Organizer Tool**
  - MOUs
  - Coordination with Others
  - Donations
  - Training and Exercise
  - Vital Records
  - Recovery Plan

**Planning Gap**
- In Progress
- Complete
Tier 3 – Fulfilling A Broader Community Role

<table>
<thead>
<tr>
<th>Disaster-specific Agreements and MOUs</th>
<th>Donations</th>
<th>Training and Exercise</th>
<th>Vital Records</th>
<th>Recovery Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Considerations for purpose and content of interagency agreements</td>
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</table>
## Tier 3 – Fulfilling A Broader Community Role

### Vital Records and Cost Recovery

- Does the agency maintain a complete inventory of vital records, along with locations of and instructions on accessing those records?
### Vital Records and Cost Recovery

#### Step 4: Critical Assets

If these items are taken away, it would drastically affect or harm your nonprofit or cause a major disruption to operations. What does your nonprofit need to operate?

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEOPLE</td>
<td>employees, consumers, donors, board members, clients/constituents, key volunteers, etc.</td>
</tr>
<tr>
<td>BUILDING</td>
<td>physical structure, storage unit, satellite office, main office, store front, capital lease, etc.</td>
</tr>
<tr>
<td>COMPUTER EQUIPMENT</td>
<td>computers, software, servers/network, specialty tools, copiers, etc.</td>
</tr>
<tr>
<td>DATA</td>
<td>documents, payroll, files, records, server back-up tapes, etc.</td>
</tr>
<tr>
<td>INVENTORY/PRODUCT</td>
<td>stock, supplies, new materials, etc.</td>
</tr>
<tr>
<td>OPERATIONS</td>
<td>any disruption to ops, accounts receivable/payable, payroll, mail room, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VALUABLE CONTENTS</td>
<td>religious artifacts, valuable collectables, etc.</td>
</tr>
<tr>
<td>BOOKS AND RECORDS</td>
<td>vital records, payroll information, etc.</td>
</tr>
<tr>
<td>EQUIPMENT</td>
<td>HVAC, kitchen equipment, audio visual equipment, specialty tools, copiers, etc.</td>
</tr>
<tr>
<td>FURNITURE AND FIXTURES</td>
<td>office furniture, custom built furniture, auxiliary furniture, etc.</td>
</tr>
<tr>
<td>ROUNDS</td>
<td>custom decorations, outdoor equipment, signage, etc.</td>
</tr>
<tr>
<td>OTHER</td>
<td>artwork, antiques, etc.</td>
</tr>
</tbody>
</table>
## Tier 3 – Fulfilling A Broader Community Role

<table>
<thead>
<tr>
<th>MOUs</th>
<th>Coordination with Others</th>
<th>Training and Exercise</th>
<th>Vital Records</th>
<th>Recovery Plan</th>
</tr>
</thead>
</table>

- Know your local resources; they may be your only source of assistance
Tier 3 – Fulfilling A Broader Role

Coordination with Others
## Tier 3 – Fulfilling A Broader Community Role

<table>
<thead>
<tr>
<th>MOUs</th>
<th>Coordination with Others</th>
<th>Donations</th>
<th>Training and Exercise</th>
<th>Vital Records</th>
</tr>
</thead>
</table>

- Planning for recovery activities and demobilization
Panelists

- LifeMoves
- SPCA Monterey County
- Video testimonial
# How to Get Started with COOP

## Step 2: Business Continuity and Recovery Planning Team

The following people will participate in business continuity and recovery planning:

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<thead>
<tr>
<th>NAME</th>
<th>POSITION</th>
<th>EMAIL</th>
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## Coordination with Others

The following people from neighboring organizations, businesses and our building management will participate on our emergency planning team:

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<th>NAME</th>
<th>ORGANIZATIONS/BUSINESS</th>
<th>EMAIL</th>
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## Meeting Schedule

The emergency planning team will meet on a regular basis:

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<th>DATE</th>
<th>LOCATION</th>
<th>TOPIC</th>
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Questions?
South Bay Training Series 2020 (Revised)
Closing Remarks

Let us know what other workshop topics you would like to see covered in the future...

Scan this QR code with your phone camera to provide your participant feedback to us...