Instructions for using the COOP Template

1. Replace all [*insert name of agency*] with the name of your agency
	1. Be sure all plan statements referencing your agency agree
	2. Make sure to update the front page and footer with agency name
2. Replace all [insert title of agency head] with the name of your director/agency administrator
3. Record the date the plan is promulgated in the header
4. The signature page is only required to have one signature – the director or administrator of the agency. More signatures can be included if desired, but are not required.
5. The Table of Contents is automatic.
	1. Upon completion of the COOP plan, be sure to click on the table of contents field and update the entire table.
	2. If you add a section:
		1. Right click on the section header
		2. Select paragraph option
		3. Update outline level (for numbers it is Level 1, for letters it is Level 2)
6. Any blue sections of the plan template are planning recommendations and should be deleted prior to plan promulgation
7. Replace all [Briefly describe actions or include as appendix.] with descriptions of your agency’s specific actions or processes.
8. Your agency may not have the amount of staff or processes as listed in the template. It is acceptable to delete some sections under Section 6, A.
9. All other Section Headings and Subheadings are a required part of COOP planning for state of Idaho agencies. For additional questions regarding deletion of pre-populated verbiage please contact the Idaho Office of Emergency Management Plans Section

Quick Start COOP Planning or Existing Plan Updates

* Using the 2017 COOP Plan Template complete steps 1, 2, and 7 as listed above.
* Identify or verify essential functions and enter into Form B.
* Identify or verify the vital records/databases necessary for each essential function and enter into Form B.
* Identify or verify the equipment necessary for each essential function and enter into Form B.
* Identify or verify the applications/systems necessary for each essential function and enter into Form B.
* Identify or verify the staff necessary to implement the COOP plan and enter in Form A.
* Identify or verify contact information for staff identified in Form A into Form C.
* Identify or verify any delegations of authority into Form D.
* Identify or verify essential positions & orders of succession into Form E.
* Use the information in Form A, B, C, and E to Identify or verify the requirements for an alternate work site and enter into Form F1.
* Identify or verify an alternate location meeting the requirements of Form F1 and enter into Form F2.
* Identify or verify all communication requirements and back-up systems in Form G.
* Identify or verify all contents necessary for a Go Kit and enter into Form H.
* Identify or verify the training, testing, and maintenance schedule and enter information into Forms I & J.
* Review plan for accuracy, complete steps 3-6 listed above. Submit a final, signed copy to the Idaho Office of Emergency Management Plans Section.

\*Please consult the 2017 COOP Planning Manual for questions regarding COOP planning & the COOP template\*



**STATE OF IDAHO**

**INSERT AGENCY NAME**

**CONTINUITY OF OPERATIONS PLAN**

**\*\* DOCUMENT CLASSIFICATION NOTICE \*\***

The information in this document, while not confidential, is sensitive in nature. All distribution and discussion of this [*insert name of agency*] is under the authority of the [*insert title of agency head]* or any individual authorized to grant permission on his or her behalf. Functional plans that outline specific emergency response operations and procedures are exempt from public disclosure in accordance with Section 9-340B Idaho State Statute.

**STATE OF IDAHO**

[*INSERT DEPARTMENT OR JURISDICTION NAME*]

**CONTINUITY OF OPERATIONS PLAN**

**APPROVALS**

This Continuity of Operations (COOP) plan was prepared by [*insert name of agency]* to develop, implement and maintain a viable COOP capability. This COOP plan complies with applicable internal agency policies, state and local regulations and supports recommendations provided by the Federal Emergency Management Agency. This COOP plan has been distributed internally within the [*insert name of agency*] and with external agencies that may be affected by its implementation.

Approved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_

**[Title] Agency Director**

Approved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_

**[Title]**

Approved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_

**[Title]**

Approved: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_

**[Title]**

**STATE OF IDAHO**

[*INSERT DEPARTMENT OR JURISDICTION NAME*]

**CONTINUITY OF OPERATIONS PLAN**

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STATE OF IDAHO

**[***INSERT DEPARTMENT OR JURISDICTION NAME***]**

**CONTINUITY OF OPERATIONS PLAN**

1. **EXECUTIVE SUMMARY**

*[Insert a brief outline of the agency and content of the COOP plan describing the plan purpose, the agency it affects, as well as the circumstances that necessitate its activation. Discuss the key elements of the COOP plan and explain the agency’s implementation strategies. Some agencies may use this space to include an Executive Operational Summary that the COOP team can use for briefing senior executive staff.]*

1. **INTRODUCTION**

The [insert name of agency] has essential functions that they must perform, or rapidly and efficiently resume, in an emergency. While the agency cannot predicate the impact of an emergency, planning for operations under such conditions can mitigate the impact of the emergency on people, facilities and the agency mission. To that end, the [insert name of agency] has prepared a Continuity of Operations (COOP) plan.

This COOP plan establishes policy and guidance to ensure the execution of the essential functions for the [insert name of agency] in the event that an emergency at the agency or in its service area threatens or incapacitates operations, and/or requires the relocation of selected personnel and functions.

COOP planning is a good business practice and is part of the fundamental mission of all agencies as responsible and reliable public agencies. The changing threat environment and recent emergencies have highlighted the need for COOP capabilities that enable agencies to continue their essential functions across all threats and hazards faced by the State of Idaho.

1. **Purpose**

The capability to prepare for, respond to and recover from emergencies affecting [insert name of agency]’s operations is dependent upon the proficiency and well-being of its employees and the clarity of its leadership. To ensure the capability to support employees and contractors, system users, emergency responders, local and regional emergency management agencies, and the public during emergencies, [insert name of agency] has adopted this COOP plan.

This COOP plan describes how [insert name of agency] will sustain the capability to perform essential functions during and after a disruption in internal operations whether caused by severe weather, other natural or man-made disasters, or malevolent attack. This COOP plan ensures that [insert name of agency]:

* has the capability to implement the COOP plan both with and without warning;
* is able to perform essential functions no later than 12 hours after activation of the COOP plan;
* is able to maintain essential functions for up to 30 days (90 days in a pandemic influenza scenario);
* conducts regularly scheduled testing, training and exercising of agency personnel, equipment, systems, processes and procedures used to support the agency during a COOP event;
* provides for a regular risk analysis of current alternate operating facilities;
* plans the location of alternate facilities in areas where the ability to initiate, maintain and terminate continuity operations is maximized;
* develops standard operating procedures which enable the performance of essential functions; and
* promotes the development, maintenance and annual review of agency COOP capabilities.

This COOP plan supports the performance of essential functions from alternate (continuity) locations (due to the primary facility becoming unusable for long or short periods) and provides for continuity of management and decision-making, in the event that senior management or technical personnel are unavailable, inaccessible, or lost to the agency.

1. **Applicability and Scope**

The COOP plan is applicable to all [insert name of agency] divisions, bureaus, units and personnel. This COOP plan describes the actions the agency shall take to activate a viable COOP capability within 12 hours of an emergency event, and to sustain that capability for up to 30 days. The agency can activate this COOP plan business and non-business hours, both with and without warning.

The COOP plan covers all facilities, systems, vehicles and buildings operated or maintained by [insert name of agency]. The COOP plan supports the performance of essential functions from an alternate (continuity) location(s) (due to the primary facility becoming unusable for long or short periods) and provides for continuity of management and decision-making, in the event that senior management or technical personnel are unavailable.

The [insert name of agency] has distributed this COOP plan to senior managers. [Insert name of agency] has provided training to personnel with identified responsibilities, and the agency has filed a copy of the COOP plan with the Idaho Office of Emergency Management.

1. **Policy**

It is the policy of the State of Idaho and the [insert name of agency] to respond quickly at all levels in the event of an emergency or threat. Quick response is vital to continue essential functions and operations, and to provide support to those affected by the emergency including the citizens of Idaho, other customers of the State, emergency management and response agencies, and other agencies or services.

A viable COOP capability identifies essential functions and consists of plans and procedures, alternate facilities, and interoperable communications and data support systems, reinforced by comprehensive training, orientation, and exercise programs. COOP capabilities must be maintained at a high level of readiness, capable of being activated both with and without warning, ready to achieve operational status no later than 12 hours after activation, and able to maintain sustained operations for up to 30 days (90 days in a pan flu scenario) or until termination.

1. **Goals & Objectives**

The goals and objectives of this plan are to:

* ensure the continuation of essential functions;
* ensure the safety of State employees;
* maintain command, control and direction during emergencies;
* reduce disruptions to operations;
* protect critical facilities, equipment, records, and other assets;
* assess and minimize damages and losses;
* provide organizational and operational stability;
* facilitate decision-making during an emergency;
* achieve an orderly recovery from emergency operations;
* assist affected employees and their families;
* provide for the line of succession to critical management and technical positions;
* provide resources and capabilities to develop plans for restoring or reconstituting regular activities, depending upon the scope, severity, and nature of the incident
* fulfill the agency’s responsibilities in local, regional and state emergency operations plans and agreements.
1. **Situation & Assumptions**

The following situations exist:

* The [insert name of agency] has recognized the need to provide essential functions and services to the citizens of Idaho, within the scope of capabilities, at any given time and under adverse conditions. Of primary concern is protection of life, property, and the environment as well as support for all first responder operational priorities.
* The potential exists for catastrophic natural and human caused disasters or public health emergencies that would disrupt normal agency functions or operations.

The [insert name of agency] has made the following assumptions in considering continuity of operations planning:

* During business hours, [insert applicable directive(s) that govern your facility evacuation] will direct building evacuations.
* Upon declaration of COOP activation by senior leadership, leadership will ensure that employees receive instructions about their responsibilities under the activation and relocation phases of the COOP plan.
* Emergencies or threatened emergencies can adversely affect the agency’s ability to continue to support essential functions and to provide support to the operations of clients and external agencies.
* Appropriate resources and funding shall be available for the planning, implementation and maintenance of the COOP program. Required resources shall be available in a timely fashion following activation of the COOP plan.
* When a COOP event is declared, the agency shall implement a predetermined plan using trained and equipped personnel.
* Agency and non-agency personnel and resources located outside the area affected by the emergency or threat shall be available as necessary to continue essential functions.
* The agency shall provide operational capability within 12 hours of the event and be able to continue essential operations for 30 days, or until termination of the event, whichever is earlier. Pandemic influenza scenarios require the ability to continue essential functions for up to 90 days.
* The disaster or its aftermath may make normally available staff members unavailable or staff may be otherwise unable to participate in the recovery.
* Procedures exist in sufficient detail, enabling another individual, other than the person primarily responsible for the work, to follow them.
* Recovery of a critical subset of the agency’s functions and application systems shall occur to allow the agency to continue essential functions adequately.
* A disaster may require agency users, clients and local agencies to function with limited automated support and some degradation of service until the agency makes a full recovery.
* In compliance with the National Incident Management System (NIMS), and Homeland Security Presidential Directive (HSPD) - 5, all COOP program activities shall incorporate the principles of NIMS and the Incident Command System (ICS).
* The [insert name of agency] developed this COOP plan to be applicable to all threats and hazards identified in the Idaho State Hazard Mitigation Plan.
1. **AUTHORITIES AND REFERENCES**
2. **Authorities**

The COOP plan has been developed with the full endorsement of the [insert name of agency]’s [insert title of agency head] and senior management.

The COOP plan complies with the following state regulations and Executive Order(s):

* Sections 46-601 and 46-1008, Idaho Code
* Executive Order 2014-07, July 22, 2014
1. **References**

References used to develop this template include:

* Continuity of Operations (COOP) Plan Template & Instructions for Non-Federal Governments, Federal Emergency Management Agency (September, 2013)
* The State of Idaho Continuity of Operations Planning Manual, April, 2017
* The State of Idaho Continuity of Operations (COOP) Template, April, 2017

Other references that have supported the development of this COOP plan include the following:

* State of Idaho Hazard Mitigation Plan, 2013
* State of Idaho Emergency Operations Plan, 2015
* Idaho Governor’s Executive Order 2014-07, July 22, 2014
1. **ESSENTIAL FUNCTIONS & PROCESSES**

[Insert name of agency] is committed to continuing all essential functions and processes even under the most challenging emergency circumstances when confronted by events that disrupt normal operations. The [insert name of agency] has identified as essential only those priority functions and processes required by statute, regulation or executive order, or are otherwise necessary to provide vital services, exercise civil authority, maintain the safety and well-being of the general populace, or to sustain critical support to the citizens of Idaho or other State departments.

During activation of this COOP plan, all other activities may be suspended to enable the agency to concentrate on providing the essential functions/processes and building the internal capabilities necessary to increase and eventually restore operations. Appropriate communications with regular or expected users of services provided by those suspended services shall be a priority.

The [insert name of agency] has identified and prioritized essential functions and processes in *Form B, Prioritized Listing of Essential Functions and Processes*. The agency should review and update all essential functions and their supporting critical processes and services, support personnel, and resources according to the agency multi-year strategy and program management plan recorded in *Form J, COOP Plan Maintenance*.

1. **CONCEPT OF OPERATIONS**

To implement the COOP plan, the agency has developed a concept of operations, which describes its approach to implementing the COOP plan, and how the agency intends to address each COOP element. In particular, this concept of operations focuses on establishing emergency decision-making authority and defining a decision process for determining appropriate actions in implementing COOP plans and procedures. This concept of operations also identifies the different classes of threat or hazard for which the agency developed the plan. Finally, the concept of operations identifies how the agency shall address issues associated with notification and alert, and command and control.

1. **Planning Scenarios**

The agency has developed this COOP plan by taking into account three separate “classes” of threats that may result in COOP activation. For each class, activities have been identified to ensure the activation of the COOP plan and the continuous capability of the [insert name of agency] to make decisions and take action.

Activation of the COOP plan may involve:

* the deliberate and pre-planned movement of selected key personnel and technical personnel to an alternate operating facility;
* the implementation of temporary work procedures;
* the delegation of emergency authorities to successors of senior management and technical personnel due to them being unavailable during the emergency; and/or
* the assignment of COOP teams to perform specific activities necessary to ensure essential functions.

The State of Idaho has identified the following three threat scenarios as the most likely to trigger COOP plan activation:

* Class 1 Scenario: Single Building/Agency: In this scenario, the incident affects a portion or all of the agency’s operations at one location, with limited displacement of operations to alternate facilities. There is limited impact on interdependencies between the agency and other operations including customers, vendors and suppliers, and the event is most likely of a short to medium-term duration. The most likely causes of such a disruption are fire; system/mechanical failure; loss of utilities such as electricity, telephone, water, or steam; or explosion (regardless of cause) that produces no significant damage to any other facilities or systems used by the agency.
* Class 2 Scenario: Catastrophic Event: This scenario assumes that an incident affects a geographic region with a cluster of State operations, e.g. the Capitol Mall. This scenario also assumes the disruption of operations to a number of agencies, leading to a massive and widespread displacement of the workforce and a disruption to multiple interdependencies between and among agencies, as well as those with customers and critical suppliers. Disruption of normal agency operations will most likely be for an extended period.
* Class 3 Scenario: Pandemic Influenza: This scenario assumes that there is a pandemic-related disruption of the workforce. This scenario affects infrastructure only to the extent that systems require maintenance and/or operation by a severely depleted workforce. Operations from an alternate (continuity) location will probably not be required. A pandemic event will most likely last for 12-18 months with as many as three waves of new infections lasting 4-6 weeks each. Continuous essential function evaluation may be required. For instance, a function that may not be critical the first 3 months will become critical the 4th month. The Idaho Influenza Pandemic Response Plan, prepared by the Idaho Department of Health and Welfare is available at www.PANFLUidaho.gov and provides further coordinating instructions.
1. **COOP Execution**

The [insert title of agency head], or his or her designated successor, may implement this COOP plan. The agency can implement the COOP plan based on known or anticipated threats and emergencies that may occur with or without warning. The State of Idaho Hazard Mitigation Plan, maintained by Idaho Office of Emergency Management, outlines these threats and identifies mitigation strategies:

* Known Threats and Emergencies (With Warning): There are some threats to operations that may afford advance warning that shall permit the orderly alert, notification, evacuation, and if necessary, the relocation of employees. Situations that might provide such warning include seasonal flooding, a transportation accident resulting in a threat of a release of hazardous material (HAZMAT) or a threat of a terrorist incident.
* Unanticipated Threats and Emergencies (No Warning) During Non-Business Hours: Some incidents are unanticipated and the agency may not receive warning, e.g., earthquakes, arson, HAZMAT, or terrorist incidents, and may occur while a majority of the on-site staff is not at work. In these circumstances, while operations from the primary facilities may be impossible, the majority of agency employees shall still be able to respond to instructions, including the requirement to relocate following proper notification.
* Unanticipated Threats and Emergencies (No Warning) During Business Hours: Incidents may also occur with no warning during normal office hours. In these circumstances, execution of the COOP plan, if indicated by the circumstances of the event, would begin with implementation of building evacuation and safe assembly procedures, continuing through to notification of the COOP Team.
1. **COOP Team**

In the event of activation or partial activation of the COOP plan [insert name of agency] has identified a COOP response team (Form A, COOP Response Team). To staff the COOP teams, the agency has identified key positions to provide management and technical expertise necessary to establish essential functions within 12 hours after the emergency event. Refer to *Form C, Personnel Contact List* for contact information.

1. **Time-phased COOP Implementation**

When confronting events which disrupt the normal operations of the agency, [insert name of agency] shall implement its COOP plan utilizing the following time- phased approach {NOTE: If your agency has essential functions of a public safety nature that must be operational according to a different schedule, please substitute your specific implementation schedule for the one described below}:

|  |  |  |
| --- | --- | --- |
| **Phase** | **Time Frame** | **Activity** |
| Phase I- Activation and Relocation | 0-12 Hours | * Notify alternate facility manager of impending activation and relocation requirements.
* Notify affected local, regional and state agencies.
* Activate plans to transfer to alternate facility.
* Instruct advance team to ready alternate facility.
* Notify agency employees and contractors regarding activation of COOP plan and their status.
* Assemble documents and equipment required for essential functions at alternate facility.
* Order needed equipment/supplies.
* Transport documents, equipment and designated communications.
* Secure original facility.
* Continue essential functions at regular facility, if available, until alternate facility is ready.
* Advise alternate facility on status.
* Activate advance, operations, and support teams, as necessary.
 |
| Phase II- Alternate Facility/Work Site Operations | 12 Hours to Termination ofEmergency | * Provide guidance to contingency team personnel and information to the public.
* Identify replacements for missing personnel (delegation of authority and orders of succession).
* Commence full execution of operations supporting essential functions at the alternate facility.
 |
| Phase III- Reconstitution | Termination of Emergency | * Inform all personnel that the threat no longer exists.
* Supervise return to normal operating facility.
* Conduct a review of COOP plan execution and effectiveness. Update COOP plan to correct deficiencies and/or incorporate best practices.
 |

A brief description of [*insert name of agency*]’s approach to each phase of activation is provided below.

* **Phase 1: Activation and Relocation**
1. **Alert and Notification:** The agency has established specific procedures to alert and notify the [insert agency head title], senior management staff, and members of the advance team, operations team, support teams and contingency teams that COOP activation is imminent. [Briefly describe procedures that support the use of Forms A “COOP Response Team” and C Personnel Contact List (Rapid Recall List), located in the Appendix]
2. **Initial Actions:** The agency has identified specific actions for the senior management team to take to terminate primary operations and activate the COOP team, communication links, and the alternate facility. [Briefly describe actions or include as appendix.]
3. **Activation Procedures for Business Hours:** The agency has established procedures for an efficient and complete transition of direction and control from the primary facility to the alternate facility, which includes security measures for both sites. These procedures complement the agency’s evacuation plans and emergency response plans. [Briefly describe procedure or include as appendix.]
4. **Activation Procedures for Non-Business Hours:** The agency has developed procedures for the notification of key staff when not at the primary site. [Briefly describe procedure or include as appendix.]
5. **Deployment and Departure Procedures (Time-Phased Operations):** The agency has made allowances for the partial pre-deployment of any essential functions that are critical to operations; the agency will determine these based on the level of threat.
6. **Transition to Alternate Operations:** The agency has established minimum standards for communication, direction, and control that staff should maintain until the alternate facility is operational. [Briefly describe procedure or include as appendix.]
7. **Site-Support Responsibilities:** The agency has developed a checklist to guide activation of the alternate facility. [Briefly describe procedure or include as appendix.]
* **Phase 2: Alternate Operations**
1. **Operational Hours:** During activation of the COOP plan, the [insert name of agency]’s operating hours will be between [insert X: XX am and X XX pm]. As staff begin to provide essential functions and additional services come on line, the [insert name of agency] may choose to extend these hours.
2. **Execution of Essential Functions:** The agency will perform any functions determined to be essential to operations from the alternate facility using temporary work orders or procedures. [Briefly describe procedure or include as appendix.]
3. **Establishment of Communications:** The agency will re-establish normal lines of communication within the agency, to other agencies, and to the public. [Briefly describe procedure or include as appendix.]
4. **Support and Contingency Team Responsibilities:** The [insert name of agency] will assign responsibilities to personnel to perform essential functions. [Briefly describe procedure or include as appendix.]
5. **Augmentation of Staff:** As the situation comes under control, the [insert name of agency] will activate additional staff to provide other services and functions, as necessary. [Briefly describe procedure or include as appendix.]
6. **Amplification of Guidance to Support the Contingency Teams:** The [insert name of agency] will provide additional guidance to all personnel in regards to duration of alternate operations and include pertinent information on payroll, time and attendance, duty assignments, etc. [Briefly describe procedure or include as appendix.].
7. **Development of Plans and Schedules for Reconstitution and Termination:** As soon as feasible, preparation for transferring operations of communication, vital records, databases and other activities back to the primary facility will begin. Circumstances may dictate that the [insert name of agency] management may designate a new primary facility. [Briefly describe procedure or include as appendix.].
* **Phase 3: Reconstitution**
1. **Reconstitution Process:** The agency will develop general guidelines and policies for ending alternate operations and returning to a non-emergency status at the designated primary facility. [Briefly describe procedure or include as appendix.].
2. **Reconstitution Procedures:** The agency will establish specific actions to ensure a timely and efficient transition of communications, vital records and databases to the primary facility. [*Briefly describe procedure or include as appendix*].
3. **After-Action Review and Remedial Action Plans:** The agency will develop a task force to assess all phases and elements of the alternate operations and provide specific solutions to correct any areas of concern. [*Briefly describe procedure or include as appendix*.]
4. **Notification and Alert**

The [insert name of agency] recognizes that they should have to ability to activate this COOP plan under all conditions:

* **With Warning**: The [insert name of agency] expects that, in many cases, they will receive a warning of at least a few hours prior to an event. This will normally enable the full execution of the COOP plan with a complete and orderly alert, notification, and deployment of key personnel to an assembly site or pre-identified deployment location. Notification will occur through beeper/pager, email and telephonic methods using standard procedures developed by the agency [reference procedure].
* **Without Warning**: The ability to execute the COOP plan following an event that occurs with little or no warning will depend on the severity of the emergency and the number of personnel that survive.
1. Non-Business Hours: The [insert name of agency] will use established processes [*Describe or include as appendix.*] to ensure COOP team personnel are alerted and activated to support operations for the duration of the emergency. Notification will occur through beeper/pager and telephonic means.
2. Business Hours: If possible, the [insert name of agency] will activate the COOP plan and deploy available members of the COOP teams to support operations for the duration of the emergency. Depending on the status of communications, notification will be made by beeper/pager, telephone, in-person at facilities, and using designated call down procedures [*Describe or include as appendix*].
3. **Delegations of Authority, Essential Positions, and Orders of Succession**

In the event that the essential positions of executive leadership, senior management or senior technical personnel are unavailable during an emergency, the [insert name of agency] has developed a set of procedures to govern both orders of succession for essential positions and delegations of authority.

* The agency has identified authorities for delegation in support of policy determinations and executive decisions. All such delegations specify what the authority covers, what limits the agency has placed upon exercising it, which (by title) will have the authority, and under what circumstances. Refer to *Form D: Delegation of Authority* for more information.
* The agency has identified authorized successors for essential positions for key management and technical positions. Refer to *Form E: Essential Positions & Orders of Succession.*
1. **RESPONSIBILITIES AND PROCEDURES**
2. **Responsibilities**

*The purpose of this section is to identify key positions within the agency and their responsibilities in the event of an emergency requiring COOP activation. This is additional detail to that found in Form A, COOP Response Team. Agencies should collapse or expand the information in this section as appropriate.*

The following lists identify major responsibilities of key and designated officials required to implement [insert name of agency]’s COOP plan. [Insert other key officials or teams, as necessary.] These responsibilities encompass all COOP duties within [insert name of agency] and may reference responsibilities outside the agency, if applicable. For additional information on state agency responsibilities during state declared disasters in conjunction with a COOP activation reference the Idaho Office of Emergency Management COOP Plan.

The [Secretary/Chief Executive] responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

The COOP Coordinator responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

The Crisis Management Team responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

The [*insert title of position*] in charge of Disaster Response Team A, B, C, etc. responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

Members of Disaster Response Team A, B, C, etc. responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

The [*insert title of position*] in charge of the Emergency Response Team responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

Members of the Emergency Response Team responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

The Reconstitution Manager responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]

Members of the Reconstitution Team responsibilities are:

* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
* [insert responsibility]
1. **Procedures**

The [insert name of agency] has developed specialized lists of responsibilities by unit based on its unique organizational structure. The agency has presented these responsibilities in checklist format for those key personnel that shall:

* manage the activation of the COOP plan;
* oversee implementation of emergency response procedures to ensure the safety of employees, contractors, customers and the general public;
* activate alternate facilities and supporting communications and information technology systems;
* support legal activities on behalf of the agency;
* provide public information;
* perform situation assessment for the agency infrastructure;
* perform inspection and repair;
* develop temporary service plans;
* lead the recovery transition; and
* oversee recovery of employees’ children from daycare for Class 1 (single) or remote evacuation site for Class 2 (area) COOP events.

The following table indicates where checklists and procedures supporting key COOP activities can be located within the agency.

|  |  |
| --- | --- |
| **Checklist/Procedure** | **Location** |
| *Building Evacuation Plan* |  |
| *Procedure for employee advisories, alerts and instructions* |  |
| *Roster of fully equipped and trained personnel* |  |
| *Personnel accountability procedure* |  |
| *Implementation of order of successions in emergency situations* |  |
| *Alert and notification checklists and/or procedures* |  |
| *Initial actions checklists and/or procedures* |  |
| *Activation during business hours checklists and/or procedures*  |  |
| *Activation during non-business hours checklists and/or procedures* |  |
| *Deployment and departure (transition to alternate facility) checklists and/or procedures* |  |
| *Pre-positioned resources and go kits* |  |
| *Activation of alternate facility checklists and/or procedures* |  |
| *Re-establishment of communications checklists and/or procedures* |  |
| *Vital record and databases contingency checklist and/or procedures*  |  |
| *Protection and safeguarding of vital record and databases* |  |
| *Vital equipment and systems contingency checklist and/or procedures* |  |
| *Resource acquisition checklists and/or procedures* |  |
| *Execution of essential functions checklists and/or procedures* |  |
| *Support and contingency team checklists and/or procedures* |  |
| *Family Support and Preparedness Plan (including the recovery of children from daycare facility or from remote evacuation site)* |  |
| *Devolution of command and control* |  |
| *Reconstitution and termination checklist and/or procedure* |  |
| *Facility vulnerability assessment* |  |
| *Pandemic Influenza Plan* |  |

1. **ADMINISTRATION AND LOGISTICS**

The [insert name of agency] has prioritized the following items based on incident specific agency priorities to support the protection of life safety, property protection, and the environment as it pertains to the agency’s organizational roles and responsibilities.

1. **Alternate Facility**

The [insert name of agency] recognizes that an incident may disrupt normal operations and that there may be a need to perform essential functions at alternate facilities.

The agency has collected information on requirements for alternate facilities that would be capable of supporting essential functions. Refer to *Form F1: Requirements for Alternate Work Site*, for more information. In addition, depending on the emergency conditions, the [insert name of agency], through cooperative agreements and mutual aid agreements, also has identified additional facilities that could support essential business functions. The agency has listed the current options for Alternate Work Sites, including any unmet space needs on *Form F2, Agency Alternate Facilities*.

1. **Vital Records/Databases, Equipment, Applications, and Systems**

The [insert name of agency] has identified vital records/databases, equipment, applications, and systems that must be available to support performance of essential functions. These are the records/databases, equipment, applications, and systems that will be prioritized for restoration and recovery in the event that a supplier or suppliers need to be contracted. For more information, refer to *Form B: Prioritized Listing of Essential Functions and Processes*.

1. **Interoperable Communications**

Protecting communications is a critical component of a successful COOP capability. Communication systems must support connectivity to internal organizations, other agencies, critical customers, and the public. To ensure communications during COOP events, the [insert name of agency] has identified primary and alternate modes of communication, and has protective controls in place for each means of communication. For more information, refer to *Form G: Interoperable Communications*.

1. **Resource Management**

Resource management responsibilities include the pre-positioning of vital records, databases, and resources preferably in an off-site or protected location. Resource management also includes preparation and maintenance of emergency go kits; arranging for travel of key personnel to the alternate facility as well as the transfer of documents and needed communications, data processing and other equipment to the alternate site.

The [insert name of agency] has identified the resource requirements necessary to relocate to the alternate facility and to continue operations. This list includes basic communications and operational tools required to initiate essential functions from an alternate site, as well as the responsibilities for providing specific resources and the circumstance under which this responsibility may shift. For more information, refer to *Form H: Agency Go Kit Contents and Maintenance List.*

1. **Employee Support**

The [insert name of agency] recognizes that the well-being of employees’ dependents and domestic companion animals are of mutual concern to ensure that employees remain available to support alternate facility operations. Employees must coordinate with their daycare providers to determine when it is appropriate to pick up their child. In some cases, the parent may be able to withdraw their child from the facility immediately. In other cases, the parent should plan to pick up the child from a remote evacuation site, as in the case of a capitol complex evacuation. Employees must determine a prudent course of action in coordination with daycare providers, and management must consider this.

1. **Procurement Process**

If circumstances require the activation of this COOP plan, the [insert name of agency] will obtain any necessary resources from pre-positioned resources (if available) or standard state procurement processes.

1. **COOP PLAN MAINTENANCE**

The [insert name of agency] has developed a multi-year strategy that provides staff with a regularly scheduled and integrated testing, training and exercise program to ensure that the agency’s COOP capability remains viable. Testing, training, and exercising is intended to familiarize agency staff members with their roles and responsibilities during an emergency, ensure that systems and equipment are maintained in a constant state of readiness, and validate aspects of the COOP plan. For more information, refer to *Form I, Training, Testing and Maintenance* and *Form J, COOP Plan Maintenance.*

**GLOSSARY**

ACTIVATION: When an agency implements their COOP plan whether in whole or in part.

ADVANCE TEAM: Group of people assigned responsibility for preparing the alternate facility for operations once the agency has activated their COOP plan.

AFTER-ACTION REPORT (AAR): A narrative report that presents issues found during an incident and recommendations on how those issues can be resolved.

ALTERNATE FACILITY: An alternate work site that provides the capability to perform minimum essential functions until the agency can resume normal operations.

CONTINUITY OF OPERATIONS (COOP): An internal effort within individual components (e.g. – executive, legislative, judicial branches) of a government to assure the capability exists to continue critical component functions across a wide range of potential emergencies, including localized acts of nature, accidents, and technological and/or attack-related emergencies.

COOP EVENT: Any event that causes a department or jurisdiction to activate all or part of its COOP. It may or may not include relocation to an alternate site to assure continuance of essential functions.

COOP RESPONSE AND RECOVERY TEAM: Individuals, identified by position, within a state department or local jurisdiction that are responsible for ensuring that essential functions are performed in an emergency and taking action to facilitate that performance, and to initiate planning necessary for the resumption of non-emergency operations at a primary facility.

CRITICAL CUSTOMERS: Organizations or individuals for which a state department of local jurisdiction performs mission-essential functions.

DELEGATED AUTHORITY: An official mandate calling on an individual holding a specific position to assume responsibilities and authorities not normally associated with that position according to established conditions.

DEVOLUTION: The capability to transfer statutory authority and responsibility for essential functions from a department’s or jurisdiction’s primary staff to other employees and facilities, and sustain that operational capability for an extended period.

ESSENTIAL FUNCTIONS: Those functions, stated or implied, that state departments and local jurisdictions are required to perform by statute, regulation or executive order or are otherwise necessary to provide vital services, exercise civil authority, maintain the safety and wellbeing of the general populace, and sustain the industrial and economical base in an emergency.

EMERGENCY: A sudden, usually unexpected event that does or could do harm to people, resources, property, or the environment. Emergencies can range from localized events that affect a single office in a building, to human, natural or technological events that damage, or threaten to damage, local operations. An emergency could cause the temporary evacuation of personnel or the permanent displacement of personnel and equipment from the site to a new operating location environment.

GO KIT: An easily transported set of materials, technology and vital records that shall be required to establish and maintain minimum critical operations.

INCIDENT COMMAND SYSTEM (ICS): A standardized on-scene emergency management construct specifically designed to provide for the adoption of integrated organizational structure that reflects the complexity and demands of single or multiple incidents, across jurisdictional boundaries. ICS is a combination of facilities, equipment, personnel, procedures, and communications operating with a common organizational structure, designed to aid in the management of resources during incidents.

INTEROPERABLE COMMUNICATIONS: Alternate communications that provides the capability to perform minimum essential functions, in conjunction with other agencies, until the agency can resume normal operations.

LEGAL AND FINANCIAL RECORDS: Vital records that the agency needs to protect the legal and financial rights of government and of the people affected by its actions.

MANAGEMENT PLAN: An operational guide that ensures the implementation, maintenance and continued viability of the COOP.

MITIGATION: Any sustained action taken to reduce or eliminate the long-term risk to life and property from a hazard event.

NATIONAL INCIDENT MANAGEMENT SYSTEM: A system mandated by Homeland Security Presidential Directive #5 (HSPD-5) that provides for a consistent national approach for Federal, state, local and tribal governments; the private-sector, and non-governmental organizations to work effectively and efficiently together to prepare for, respond to, and recover from domestics incidents, regardless of cause size or complexity.

ORDERS OF SUCCESSIONS: Provisions for the assumption of senior department and jurisdictional offices and other positions held by critical COOP personnel when the original holder of those responsibilities and/or authorities is unable or unavailable to execute their duties.

PLAN MAINTENANCE: Steps taken to ensure that the agency reviews the plan annually and updates whenever major changes occur.

PRIMARY FACILITY: The site of normal, day-to-day operations; the location where the employee usually goes to work.

RECONSTITUTION: The resumption of non-emergency operations at a primary facility following emergency operations at an alternate facility.

VITAL RECORDS: Electronic and hardcopy documents, references and records needed to support essential functions during a COOP event, to recover full operations following an emergency, and to protect the legal rights and interests of citizens and government. The two basis categories of vital records are emergency operating records (e.g. plans and directives, orders of succession, delegations of authorities and staffing assignments) and rights and interests records.

VITAL EQUIPMENT AND SYSTEMS: Equipment and systems the agency needs to support essential functions during a COOP event.

ANNEX A: FORMS

FORM A: COOP Response Team

|  |
| --- |
| AUTHORITY TO IMPLEMENT COOP PLAN |
| Key Executive | Title/Position | Office Phone # | Alternate Phone | email |
|  |  |  |  |  |

|  |  |  |
| --- | --- | --- |
|  | Team Members | Team Responsibilities |
| Command | Example: Ted Cahill, Chief Counsel | Example: Determine objectives and establish priorities based on nature of the incident |
|  |  |  |
| Planning | Example: Pam Jones, Planning | Example: Develop IAPs |
|  |  |  |
| Operations | Example: Kay Smith, Operations Chief | Example: Directs all resources |
|  |  |  |
| Logistics | Example: John Brown, Facility Support | Example: Assembles necessary documentation and records |
|  |  |  |
| Finance/Administration | Example: Beth Robinson, HR | Example: Monitors costs |

FORM B: Prioritized Listing of Essential Functions and Processes

The following chart outlines the essential functions and/or processes that are necessary for the implementation of [*insert agency name*] COOP plan. The records/databases, equipment, and applications/systems necessary for each essential function are identified and prioritized to ensure all necessary components are protected and recovered during COOP operations. The priorities are as follows: Tier 1) Function must be operational within 12 hours; Tier 2) Function must be operational within 13 hours to 1 week; Tier 3) Function must be operational one week to two weeks; Tier 4) Function is not required until Tiers 1-3 are operational; Tier 5) Function is not required for 30 or more days.

|  |  |
| --- | --- |
|  |  |
| PRIORITY | FUNCTIONS/PROCESSES | VITAL RECORDS/DATABASES | EQUIPMENT | APPLICATIONS/SYSTEMS |
| *1* | *Implement the Individual and Public Assistance plans as needed for an effective response and onsite training of jurisdictions for recovery process.* | *PDA Forms;**PA training PowerPoint File; H:Drive* | *5 workstations;**Microsoft Office suite; Visio;* *Adobe Acrobat;**Outlook* | *WebEOC;**Intra/internet;**EMMIE; TRIM;**DARS mobile application* |
| *1* | *WebEOC project and event status monitoring and update.* | *WebEOC records* | *2 workstations* |  |
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FORM C: Personnel Contact List (Rapid Recall List)

The Personnel Contact List is a short document with a cascade call list and other critical phone numbers. The cascade list includes COOP team members, essential personnel, agency management and emergency personnel, both inside and outside the agency. The Point of Contact (POC) will activate the list, initiate the first contact with the agency head, and COOP team.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee Cascade List | Email Address | Work # | Home # | Cell/Pager # |
| Agency Head |  |  |  |  |
| COOP Team (Form A) |  |  |  |  |
| Employee A |  |  |  |  |
| Employee B |  |  |  |  |
| Employee C |  |  |  |  |
| Employee D |  |  |  |  |
| Employee E |  |  |  |  |
| Key Personnel & Management |  |  |  |  |
| Employee I |  |  |  |  |
| Employee J |  |  |  |  |
| Employee K |  |  |  |  |
| Employee L |  |  |  |  |
| Employee M |  |  |  |  |

|  |  |
| --- | --- |
| Emergency personnel | Phone Number(s) |
| Fire Department |  |
| Police Department |  |
| Ambulance/EMS |  |
| ID State Emergency Operations Center |  |
| Alternate Facility Contacts |  |
| Employee Emergency Hotline  |  |

FORM D: Delegation of Authority

In developing this list, the [*insert agency name*] reviewed its pre-delegated authorities for making policy determinations and decisions at headquarters, field levels, and other agency locations as appropriate.

|  |  |  |  |
| --- | --- | --- | --- |
| Authority | Position Title Holding Authority | Triggering Considerations | Limitations of Authority |
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FORM E: Essential Positions & Orders of Succession

Below is a list of orders of succession to essential positions critical to the [*insert agency name*] COOP plan.

|  |  |  |  |
| --- | --- | --- | --- |
| Essential Position | 1st SuccessorName/Position | 2d SuccessorName/Position | 3d SuccessorName/Position |
|  |  |  |  |
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FORM F1: Requirements for Alternate Work Site

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Directorate/Bureau/Division | CriticalFunction | ResourcesNeeded | SpaceNeeded | # StaffRequired | TeleworkPossible?Y/N | InterdependentFunction?Y/N | Dependent Upon? |
| Bureau of Food Distribution | Transfer of food to congregate feeding site | 2Xphones w/ long distance service1XFAX4XcomputersStandard power source | 576 sq. ft(note 1) |  4 |  N |  Y | USDAIOEMRed CrossID DPT of Education |
|  |  |  |  |  |  |  |  |
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**Note 1: Pandemic flu social distancing planning requirement is 3-6 feet in each direction between employees**

FORM F2: Agency Alternate Facilities

|  |  |  |
| --- | --- | --- |
| Alternate Location Address | Type of Arrangement | Unmet Space Needs |
| Expo Idaho Complex | MOU | N/A |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

FORM G: Interoperable Communications

Below are current and alternative providers, and/or alternate modes of communication that the agency must protect and recover during COOP operations.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Communication Mode | CurrentProvider | AlternateProvider | Alternative Mode#1 | Alternative Mode#2 |
| Voice Lines |  |  |  |  |
| Fax Lines |  |  |  |  |
| Data Lines |  |  |  |  |
| Pagers |  |  |  |  |
| Cell Phones |  |  |  |  |
| email |  |  |  |  |
| Internet Access |  |  |  |  |
| Instant Messenger |  |  |  |  |
| Blackberry/PDAs |  |  |  |  |
| Radio Communications |  |  |  |  |
| Other |  |  |  |  |
|  |  |  |  |  |

FORM H: Agency Go Kit Contents and Maintenance

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Item | AgencyUnit | Location | Quantity | Maintenance Performed By | Maintenance Date |
| COOP Plan |  |  |  |  |  |
| Communications Equipment |  |  |  |  |  |
| Computer Equipment |  |  |  |  |  |
| COOP Procedures |  |  |  |  |  |
| Contact Lists |  |  |  |  |  |
| Memorandums of Agreement |  |  |  |  |  |
| Map to Alternate Site |  |  |  |  |  |
| Vital Records |  |  |  |  |  |
| Office Supplies |  |  |  |  |  |
| Other (List) |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

FORM I: Training, Testing and Maintenance

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Training Components | Training Type | Targeted Staff | Responsible Staff | Frequency | Date Scheduled | Date Completed |
| Training | Example: COOP Awareness | Online – FEMA IS 546 | COOP Team | Senior Leadership | Annually | NLT 2/28/09 | 2/15/09 |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  | Testing Components | Responsible Staff | Frequency | Date Scheduled | Date Completed |
| Testing | Example: Table Top with Senior Leadership | COOP Program Manager | Annually | 7/15/09 | 7/15/09 |
| Example: Functional Exercise (Alt Site Relocation) | COOP Program Manager | Bi-annually | 11/25/09 | 11/25/09 |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  | Maintenance Components | Responsible Staff | Frequency | Date Scheduled | Date Completed |
| Maintenance | Example: Update Call Trees | HR Office | Semi-Annually | 6/15/09 | 6/30/09 |
| Example: Update Vital records Schedule | Records Coordinator | Annually | 11/15/09 | 11/15/09 |
|  |  |  |  |  |

FORM J: COOP Plan Maintenance

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Tasks | Frequency | Date required | Date Completed |
| Plan Update and Certification | 1. Review entire plan2. Incorporate lesson learned and changes in policy3. Manage distribution of plan updates | Semi-annually |  |  |
| Maintain and update Orders of Succession | 1. Obtain names of current incumbents and designated successors2. Update Delegations of Authority | As needed |  |  |
| Checklists | 1. Update and revise checklists2. Ensure annual update | As neededAnnually |  |  |
| Update rosters of all positions | Confirm/update information on rostered members of COOP Team | Quarterly |  |  |
| Appoint new members of COOP Team | 1. Qualifications determined by COOP leaders2. Issue appointment letter and schedule orientation | As needed |  |  |
| Maintain alternate work site readiness | 1. Check all systems2. Verify access codes and systems3. Cycle supplies and equipment as needed | Quarterly |  |  |
| Review and update supporting MOU/MOA | 1. Review for currency and new needs2. Obtain signatures renewing agreement or confirming validity | Annually |  |  |
| Monitor and maintain equipment at alternate site(s) | 1. Train users and provide technical assistance2. Monitor volume/age of materials and assist users with cycling/removing files | Ongoing |  |  |
| Train new members | 1. Provide orientation and training class2. Schedule participation in all training and exercise events | Within 30 days of appointment |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Tasks | Frequency | Date Required | Date Completed |
| Orient new policy officials and senior management | 1. Brief officials on COOP2. Brief each official on his/her responsibilities under COOP | Within 30 days of appointment |  |  |
| Plan and conduct exercises | 1. Conduct internal exercises2. Conduct external/joint exercises with local/regional/state agencies3. Support and participate in interagency exercises  | Semi-annuallyAnnuallyAs needed |  |  |
| Maintain Security Clearances | Obtain, maintain and update appropriate security clearances  | Ongoing |  |  |