

Policies and Procedures

List all the policies and procedures your organization needs to include in the Business Continuity Plan. You should isolate policies and procedures that directly reflect the critical functions of your organization. Then rank the policies and procedures in order of priority based on their value in completing the critical functions and accomplishing the organization's mission. Existing policies and procedures should be reviewed to see if these can be used in the BCP.

Policies and Procedures that May Exist in Your Organization (check all that apply)

- Evacuation Plan
- Evacuation plan that provides a method to determine if all persons in the facility were evacuated
- Evacuation plan that provides an alternative worksite to resume operations if necessary
- Emergency contact information for all staff and board members and alternative contact information in case of communications failure
- Protection of paper-only records and documents
- Expanded check-writing authority
- Alternative supply of needed items in the event the building cannot be accessed or items are destroyed
- List of local emergency numbers (fire, police, hospital, etc.)
- Method to communicate with clients
- Method to deliver goods or services to clients
- Contact information for media
- Backup (electronic or other) of important data, records or files
- List of inventory, supplies, equipment needed for daily operations
- Instructions to staff in the event of an emergency
- Instructions to staff in the event of an emergency related to hazardous materials
- Other (please specify):

Important Documents or Information and Location of Stored Data

| Item | Does it exist? | Where is it stored? |
|--|---|---------------------|
| Organization chart showing names and positions | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Previous Business Continuity Plan | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Contact information that will put the organization in contact with the Board, management and staff and information to reach the person's emergency contact | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Critical Information for Each Functional Area | | |
| IT-specific hardware/software that will be necessary to resume operations in your functional area | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Vendors for your location and alternate locations | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Office Supplies | <input type="checkbox"/> Yes | |

| | | |
|---|---|--|
| | <input type="checkbox"/> No | |
| Furniture | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Public relations and media contacts | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Other people, supplies and other resources necessary to resume operations | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Data and Records Storage | | |
| Does your organization rely on software for daily operations? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Are the files created by this software backed up? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| How frequent are the backups? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| What is included in the backups? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| How can you obtain the backups? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Who is authorized to retrieve them? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Where will they be delivered? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| How long will it take to restore them? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Who will restore them? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| What are your organization's most important hardcopy records? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Where are they stored? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Are there copies of these records? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| Are the copies stored offsite? In microfiche? Scanned to a computer? | <input type="checkbox"/> Yes <input type="checkbox"/> No | |

Policies Needed

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

Policy Order of Priority

| Have | Need | Person | Due Date |
|------|------|--------|----------|
| | | | |
| | | | |
| | | | |
| | | | |

Procedures Needed

1.

2.

3.

4.

5.

6.

7.

8.

9.

Procedure Order of Priority

1.

2.

3.

4.

5.

6.

7.

8.

9.