

## Instructions

It is important to have information that is up to date and in a secure place where you can access it, either printed or online. We have created five online files to help you capture and store this valuable information. After you gather and document the information, print one or more copies and save the files to a secure place where you will be able to access them in an emergency.

All online tools are set up to print on 8-1/2 x 11-inch paper in landscape mode.

### Continuation of Operations Plans

There are two COOP files in Word. Each file includes detailed instructions:

1. COOP-by-disaster.docx
2. COOP-by-task.docx

### Continuation of Operations Lists

There are three list files in Excel; each one is divided into a number of **worksheet tabs**. Be sure to review all the tabs and fill out the ones that apply to your organization.

#### **inventories.xlsx**

Worksheet tabs:

1. Key Documents
2. Office Inventory
3. Technology Inventory
4. Software Inventory
5. Online Software & Subscriptions
6. Backups
7. Media Inventory
8. Equipment & Vehicles
9. Land & Buildings

#### **people-contacts.xlsx**

Worksheet tabs:

1. Employees
2. Volunteers
3. Board Members
4. Insurance Policies
5. Key Donors

#### **resources-partners.xlsx**

Worksheet tabs:

1. Partners
2. Neighborhood Resources
3. Alternate Work Sites

#### **Alternatives to Excel**

If you don't want to use Excel, you can still capture the data using a different tool. You might prefer to use Word or a text-based tool, or you might prefer to use a database program. Just **make sure that the solution you choose is easy to access after a disaster**, no matter how tech-savvy the user is.

On the following page, we have listed all the fields from the Excel documents. Use this list to make sure you document everything you need in your chosen format.

## Continuation of Operations Lists: All the Data

*If you use the Excel files we've created, all you have to do is open the file and start entering the data. The following lists are provided for users who'd like to capture their data using a different tool.*

### Inventories

#### 1. Key Documents

For each Key Document, document the following information:

- a. Name of document
- b. Onsite Location
- c. Offsite Location
- d. Online Location

Key Documents include any or all of the following:

- Incorporation paperwork (state)
- IRS charity determination letter
- Bylaws
- Board minutes
- Corporate seal
- Business license (city/county)
- Tax returns
- Audited financial statements
- Blank checks
- ATM cards
- Credit cards
- Lease/deed
- Password documentation
- Building safe
- Building security code

#### 2. Office Inventory

For each item, document the following information:

- a. Item
- b. Brand/Model
- c. Purchase date
- d. Purchase price
- e. Photo?
- f. User/Location
- g. Other

#### 3. Technology Inventory

For each item, document the following information:

- a. Item
- b. Tech type (use list)
- c. Brand
- d. Model #
- e. Serial #
- f. Purchase date
- g. Photo?
- h. User/Location
- i. HARDWARE SPECS
  - i. Processor
  - ii. Hard drive

#### Types of Technology:

Desktop computer  
Laptop  
Monitor  
Tablet  
Server  
Phone  
Printer  
Other

- iii. Memory/RAM
  - j. SOFTWARE APPLICATIONS
    - i. Operating system
    - ii. Version
    - iii. Antivirus brand/version
- 4. Software Inventory
 

For each application, document the following information:

  - a. Program
  - b. Version
  - c. Product Key
  - d. Purchase date
  - e. Vendor
  - f. Location (user/computer)
  - g. Other

- 5. Online Software & Subscriptions
 

For each application or subscription, document the following information:

  - a. Program
  - b. Purpose
  - c. Website
  - d. Primary user (if applicable)
  - e. Location where password can be found

Following is a list of some applications your organization might be using:

- Adobe
- Canva
- Database
- Email system
- Facebook
- Google docs
- Instagram
- Paypal
- Quickbooks
- Slack
- Stripe
- Tax software, such as TaxCut or H&R Block
- Twitter
- WaveApps

**IMPORTANT NOTE ABOUT PASSWORDS:**

We encourage you to use a password vault or secure system to store passwords.

**Do not store passwords in a public document.**

- 6. Backups
 

For each backup, document the following information:

  - a. Files Backed Up
  - b. Date of Backup
  - c. Method (see list at right)
  - d. Location
  - e. Automated? (Y/N)

**Back up methods**

External hard drive  
Flash or "thumb" drive  
Cloud service (Dropbox, Google, etc.)  
Remote server  
Password vault  
Other

**Media Types**

Photo/digital  
Photo/hardcopy  
Logo  
Video  
Audio  
Artwork  
Other

- 7. Media Inventory
 

For each item, document the following information:

  - a. Item
  - b. Type
  - c. Use
  - d. Location

### 8. Equipment & Vehicles

For each item, document the following information:

- a. Equipment
- b. User
- c. Brand
- d. Model
- e. Model #
- f. Serial #
- g. Registration # or License Plate
- h. Purchase Date
- i. Purchase Price
- j. Vendor
- k. Vendor Contact
- l. Phone
- m. Photo?
- n. Other

### 9. Land & Buildings

For each item, document the following information:

- a. Item
- b. Address/location
- c. Use
- d. Date of purchase
- e. Assessed value
- f. Date of last assessment

## People-Contacts

### 1. Employees

For each employee, document the following information:

- a. Employee Name
- b. Title/Position
- c. Home Address
- d. Home Phone
- e. Cell Phone
- f. Alternate Phone
- g. Email
- h. EMERGENCY CONTACT PERSON 1
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- i. EMERGENCY CONTACT PERSON 2
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- j. CERTIFICATIONS/SKILLS
  - i. First Aid
  - ii. CPR
  - iii. NIMS
  - iv. EMT
  - v. ASL

- vi. Languages
- vii. Other

### 2. Volunteers

For each volunteer, document the following information:

- a. Employee Name
- b. Title/Position
- c. Home Address
- d. Home Phone
- e. Cell Phone
- f. Alternate Phone
- g. Email
- h. EMERGENCY CONTACT PERSON 1
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- i. EMERGENCY CONTACT PERSON 2
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- j. CERTIFICATIONS/SKILLS
  - i. First Aid
  - ii. CPR
  - iii. NIMS
  - iv. EMT
  - v. ASL
  - vi. Languages
  - vii. Other

### 3. Board Members

For each board member, document the following information:

- a. Employee Name
- b. Title/Position
- c. Home Address
- d. Home Phone
- e. Cell Phone
- f. Alternate Phone
- g. Email
- h. EMERGENCY CONTACT PERSON 1
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- i. EMERGENCY CONTACT PERSON 2
  - i. Emergency Contact Name
  - ii. Relation
  - iii. Location
  - iv. Phone
- j. CERTIFICATIONS/SKILLS
  - i. First Aid
  - ii. CPR

- iii. NIMS
- iv. EMT
- v. ASL
- vi. Languages
- vii. Other

#### 4. Business Services

Document the following for each company you do business with:

- a. Company Name
- b. Business Type
- c. Contact
- d. Phone
- e. Cell Phone
- f. Email
- g. Address/Location
- h. Other

Businesses that might be on your list include the following:

- Accountant/CPA
- Attorney
- Banker
- Benefits admin
- Building manager
- Building security
- Creditor
- Electric company
- Gas/heat
- IT Consulting
- IT Vendor
- Insurance agent (document policy details on the next tab)
- Internet service
- Investment broker
- Landlord
- Payroll processing
- Phone company
- Trash/waste management
- Website host
- Other

#### 5. Insurance Policies

For each policy, document the following information:

- a. Type of insurance
- b. Do you have this?
- c. Company
- d. Policy number
- e. Representative name
- f. Rep phone number

Types of insurance you might have are listed below. (This list does not constitute a statement that you should have all these types of insurance.)

- Auto
- Business interruption
- Business owners policy
- Dental insurance

- Directors & Officers liability
- Disability insurance
- Event insurance
- General liability
- Health insurance
- Life insurance
- Property
- Renter
- Retirement plan
- Unemployment insurance
- Volunteer
- Workers' compensation

### 6. Key Donors

For each key donor, document the following information:

- a. Key Donor Name
- b. Phone
- c. Email
- d. Address/Location

## Resources-Partners

### 1. Partners

For each partner, document the following information:

- a. Organization Name
- b. Services
- c. Contact
- d. Phone
- e. Cell Phone
- f. Email
- g. Address/Location
- h. Other

### 2. Neighborhood Resources

For each resource, document the following information:

- a. Service
- b. Location
- c. Contact
- d. Phone
- e. Website

Neighborhood resources include the following:

- Fire
- Police
- Health clinic
- Hospital
- Power station
- Shelter
- City government
- County government
- Other

### 3. Alternate Work Sites

For each work site, document the following information:

- a. Name

- b. Location
- c. Contact Name
- d. Contact Phone
- e. Contact email
- f. # Work Stations
- g. Equipment
- h. Do we have a formal agreement?