



Association of Contingency Planners Garden State Chapter Newsletter

Dedicated to the evolution of Business Continuity

1Q 2011

President's Corner Stan Carlstadt

Well here we are in 2011!

I hope everyone had a great holiday and safe and fun New Years.

As I look back on 2010 and our ACP chapter, I can't help but think that we had a good year.

We continued to get great support from companies hosting our chapter meetings and I've received much positive feedback regarding the presentations at those meetings.

Nine of our members serve as our Board of Directors and I can't praise them enough for all their time and efforts. We have two board meetings a month and in addition, each person has their area of responsibility to care for and manage. I can go on and on but, I think our newsletter and website are just great and everyone on the team kicks in and adds value.

Looking forward to 2011, we hope to continue on the same course with emphasis on always striving to make everything a notch better. Please keep in touch and give us your

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Lessons Learned from AmeriGas Partners, L.P.

By Bill Michael, CBCP, CCM

As business continuity professionals, our purpose in life is to facilitate the development of core competencies and capabilities within an organization to ensure business continuance in the event of a major crisis event, and to validate the organization's state-of-readiness for such an event through awareness training and exercises. However, and thankfully so, many of us never have had to enact our plans for a material event.

Mort Mikkelsen, Enterprise Account Manager at DBSi, was kind enough to share a whitepaper DBSi developed for AmeriGas Partners, L.P. The white paper reaffirms what most of us already know – the BC guiding principles; *plan, test, improve, repeat*. AmeriGas embodied that philosophy and the excerpts from the white paper I am about to share demonstrates how their level of crisis preparedness enabled them to sustain a fire at their headquarters with minimal business interruption. Recovery of tier-1 and 2 systems within stated recovery time objectives ("RTO"), field operations which drive revenues for the business were unaffected, and the relocation of all AmeriGas employees into a fully functional recovery space a mere three weeks after the event --- impressive to say the least.

At the conclusion of this reading I would like you to take away the following;

- Value of continuous improvement; big bang theory doesn't work, incremental gains afford you the best opportunity to address the risk presented to your business.
- Communication is King; access to diverse channels is paramount for mobilization of emergency response teams and employee notification and coordination.
- Identification and management of critical Vendors / Suppliers; whether directly, as in reliance upon third party services, or indirectly, as in supply chain recovery efforts – there is a dependency upon your business with these partners that are essential to your recovery efforts and/or crisis avoidance.
- Lessons learned; as reaffirmed by AmeriGas, no matter how successful a recovery effort is, there are always things that can be improved upon. Don't bask in the glory of the now, but learn from it and to be more prepared for the future.

The following are excerpts from the AmeriGas white paper. Enjoy!!!

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ACP 2010 Most Valuable Player Award (MVP)

The 2010 MVP Award was presented at our Garden State Chapter Meeting in December at Maggiano's Restaurant. The award is voted on by each member of the Board of Directors and is presented at each December meeting by the chapter president. The MVP recipient never knows they are getting the award until it is announced at the meeting. The plaque is ordered in advance by the chapter president and the name is kept secret - even to the Board of Director members until the presentation.

The criteria for the award are:

- The recipient is verified by the chapter board as an ACP member in good standing
- The recipient provides outstanding service and value to the chapter - be that knowledge, enthusiasm, participation, and/or interface with others; and
- The Chapter board is in agreement on the selected recipient. This can be a board member

Each year this process has gone smoothly - until this year. The recipient signed up for the meeting and all was going well. Then at the morning of the meeting the recipient emailed me with an FYI that he could not make the meeting - he usually takes photos for us at our meetings. A last minute emergency at work necessitated him to be at a client's home office during our Chapter Meeting timeframe. Since this award is usually an important part of our Chapter Meeting, I didn't know what to do! So I got on the phone and called him and had to say - *"each year our MVP Award is a surprise - this year I have to break tradition and tell you in advance that you are the recipient this year."*

If you are anywhere within driving distance, please drive down here during lunch - I will stop the meeting and give you the award and you can then get back to work. You have to do this."

So I'm very happy to say that Bernie Jones, our Information Director and webmaster slid into the meeting all out of breath (with a big smile) and made it on time to accept the award. It took about 10 minutes and he had to immediately turn around and head back to his client's office.

When it comes to supporting both his home ACP chapter as well as all National ACP chapters Bernie has to be given high praise. Bernie unselfishly contributes many hours per week in making our website the best. In addition, he spends much time assisting other ACP chapters in developing and updating their websites - he receives several assistance calls per week from other ACP chapters and diligently shares his expertise. Bernie's real job at Medco is extremely busy with lots of travel. Despite his workload, he always makes sure our website is updated with new meeting notices, registration pages and a multitude of other small but time consuming changes. Bernie is very dedicated to his ACP Director position and thus is a key player on our leadership team.

Congratulations to Bernard Jones - our 2010 ACP Garden State Most Valuable Player!!

Stan Carlstadt
 President, ACP Garden State Chapter



Stan Carlstadt presenting MVP award to Bernie Jones

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Lessons Learned from AmeriGas Partners, L.P.

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AmeriGas – Synopsis

Three years ago, AmeriGas Chief Information Officer Rick Fabrizio asked “what if a disaster shut down access to Valley Forge?”

At the time, no one expected such a catastrophe to happen, but that foresight led to AmeriGas’ development of a Disaster Recovery and Business Continuity Team that established a back-up plan. Begun in 2006, the plan spanned IT and critical Business Function recovery, leveraged third party recovery space, and included annual testing. The goal was simple – to “minimize the impact to customers, employees and cash flow”.

At 6pm on Wednesday, December 16th 2009, all of AmeriGas’ preparation was put to the test as fire broke out at the joint headquarters of AmeriGas and AmeriGas’ parent company UGI. As a result of prior preparation and the general “can do” attitude that permeates the AmeriGas organization, recovery teams were able to avert any material impact to AmeriGas’ field operations. In the paper that follows, the incident, response and lessons learned will be documented for the purpose of sharing and helping other companies consider how they may establish a pragmatic yet effective approach to continuity.

Continuous Improvement

AmeriGas had, in 2006, begun to address Business Continuity through the identification of a backup scenario for a critical enterprise transactional system. Not unlike most companies, AmeriGas had begun to address Continuity of Operations through Information Technology. Through a gradual approach, critical systems

were added to scope, offsite recovery space was identified and contracted, and multiple disaster recovery tests were executed. Each time, AmeriGas IT focused on improving their ability to recovery critical systems in preparation for a disaster.

Additionally, AmeriGas expanded the Continuity Program to the Finance group, developing key Finance function recovery scripts in 2007 and beginning recovery exercises in 2008.

AmeriGas established consistent testing of Information Technology and Business recovery capabilities with a clear focus on continuous improvement.

2006

- Relocated one of two critical servers to the Valley Forge Data Center and enabled redundant data logging.

2007

- Contracted with DBSi for recovery workspace and co-location of backup hardware.
- Developed playbooks for all core departments that were needed on-line immediately after a disaster.
- Houston site develops IT and Business recovery plans.

2008

- Successful IT and Business Recovery test completed for Valley Forge Headquarters at DBSi; lessons learned included as objectives for 2009 test.
- Houston site successfully implements IT and Business recovery plans during Hurricane Ike.

2009

- Successful IT and Business recovery test completed for Valley Forge Headquarters at DBSi; 144 of 148 objectives met, including lessons learned from 2008 test.
- Ohio Call Center completes first IT recovery test.
- **December 16, 2009 Fire Occurs**

through the experience, John noted that there is some planning that should be done to ensure they know “what to do, who to do it and how to be effective quickly.”

Key Points:

- Due to the time of day of the fire, key IT personnel who were still on site were mobilized immediately.
- Critical Communication Systems (email and mobile mail) were disabled as a result of the fire and had to be recovered – in the interim communication was completed via cell phone calls and conference bridges.
- Due to AmeriGas’ distributed business model no field data was lost.

Martin Gibbins, Technical Services; Aside from the execution of the technical recovery, Martin notes that clear communication to employees was critical. Some people were getting information from the press and news outlets rather than through AmeriGas leadership and thus were receiving differing information. Town Hall Meetings were excellent ways to clear up confusion, put employees at ease and reassure them that AmeriGas had a plan and was executing it well.

Vendor Management

Steve Kossuth, Procurement; Confronted with an aggressive goal to have all AmeriGas employees back into an office location and functioning as soon after January 1 as possible, the Recovery Team mobilized immediately and reached out to key vendors. “Suppliers stepped up and worked side by side with AmeriGas – they put in long hours up to 16 hours some days and worked with us on holidays” to help with the recovery, according to Steve.

Power of Communication

John Iannarelli, Technical Services; The first 72 hours were well coordinated, but, John admits that they “really hadn’t planned Crisis Management past that.” The short term coordination of AmeriGas leadership led AmeriGas to experience many of the details that can be overlooked when Crisis planning. Items such as conference bridge lines, up to date phone lists and meeting space were all worked through well by AmeriGas at the time of incident; but

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Lessons Learned

While the recovery efforts were extremely successful, AmeriGas feels that there were many lessons to be learned from the incident and has already begun to address some critical elements of continuity in order to be even more prepared for a possible, although hopefully never to arrive, future incident.

Key Vendors

AmeriGas relied on key service providers and vendors before, during and after the disaster incident. Rapid response and long hours working side by side with AmeriGas the following service providers were critical to recovery:

- DBSi – Contracted Workspace Recovery and Co-Located Hardware services
- Dell – Quick ship laptops and Interim Recovery Site cabling
- NWN – Network and telephony architecture
- Gotham Technology Group – Infrastructure project management
- PPT Consulting – DR/BCP consulting services

Steve believes that the make-up of the Recovery Team and the fact that everyone felt recovery was a “personal responsibility” was a major factor in the achievement of the aggressive goal of having all AmeriGas employees into the recovery space and functioning by Tuesday, January 5th, less than three weeks after the fire incident.

Below are listed some Lessons that AmeriGas has noted as a result of their fire incident:

- Start with a manageable yet meaningful scope (critical systems) for recovery plans and tests and increase the scope incrementally.
- Don't limit exposure to the recovery plan(s) and recovery site(s) to those who are immediately critical. Allow other members of the organization to take a trip to the recovery site, to understand what plans exist and what would happen to mobilize after an incident.
- Ensure adequate space is reserved for key personnel at the recovery site
- Connectivity is critical.
- Key peripherals are critical and need to be included in recovery plans.
- Relationships with key vendors were crucial to success.
- Clear and consistent communication is critical.
- Crisis Management Planning should consider long term displacement, not just a few hours or days; AmeriGas' plans did not contain any provisions, instructions or contact information to assist in interim site procurement.
- Ensure that critical office supplies are considered; for example, if you use high-speed printers in a given department ensure that you have those as part of your recovery or have a quick-ship arrangement to get them.
- Consider the human element of disaster; designate resources to deal solely with the personal impact and morale of the workforce.
- Consider engaging critical vendors about their recovery plans and how they could support you at time of disaster. Consider other vendors that might be “ancillary” and engage them as well (e.g., office furniture, wiring, office supplies, etc.).
- Don't undersize your recovery location – it's difficult to ask office personnel to work from home for an extended period of time.
- Enforce policies related to shared drives and files; work to ensure critical files are not on employee HDDs but are in fact included on backed up servers.
- Ensure connectivity in/out of the recovery site is adequate for real work volumes.
- Plans will cover most of what you need to address for recovery – your people will cover the missing elements
- Establish clear and rapid communication protocols for the workforce and choose a person to lead this effort immediately after the incident; as social media becomes more prevalent, mis-information can cause a severe impact on morale.

AmeriGas Recovered Tier 1 and Tier 2 Systems within their planned timeframes:

Tier 1 – within 48 hours of Disaster

- Remote District Connectivity
- Communications
- Computers / Phones for Recovery Team

Tier 2 – within 96 hours of Disaster

- Core ERP Systems
- EDI
- Critical External Interfaces

ACP Garden State on Facebook & LinkedIn

The ACP Garden State chapter has joined the 21st Century! We now have a Facebook page and we also have a group at LinkedIn. You can become a member of both and receive updates on our meetings and other events, discuss subjects of interest to our community and network with members at both sites.

On **Facebook** simply search for ACP Garden State or follow this link: http://www.facebook.com/group.php?gid=143581095670038&v=app_2344061033#!/group.php?gid=143581095670038&v=wall

The **LinkedIn** group can be found with the same search term or follow this link: <http://www.linkedin.com/groups?gid=3689682&mostPopular=>

Sincerely,
Morten K. Mikkelsen

Chapter Meeting Locations

A very happy 2011 to all of you - our chapter members! As I have mentioned before, I think 2010 was a great year for our chapter. As we move forward in 2011, we need your assistance in identifying potential ACP meeting locations. As you know, we try to alternate our meetings across our membership base. Our Board of Directors and especially our Program Director, Michael Beninato, is looking for additional locations to hold our Chapter Member Meetings in 2011.

It's not difficult to host a meeting. Michael does a great job in working with our host companies in setting one up. You would provide a conference room at your company's location. Lunch is optional but very much appreciated if your company is willing to make that contribution to our membership. Michael can assist with potential guest speakers and the agenda.

We appreciate any assistance you can lend. We also welcome suggestions on meeting locations, time frames, speaker topics, etc. Please feel free to contact Michael (michael.beninato@ml.com) or myself to discuss future Chapter Meetings. Thanks in advance - and here's looking to a successful year for all our Chapter Members!

Respectfully,
Stan Carlstadt

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feedback and suggestions. Most of all we look forward to your support and camaraderie - that's what it's all about!

I just got word from Mike Marker of our Nomination Committee that he has accepted a new position as Manager of BCP & DR in Minnesota. Mike has been a faithful member of our chapter and our annual Nomination Committee - we will miss his participation and faithful attendance at all our chapter meetings. Best regards from all of us to Mike!

Respectfully,

Stan Carlstadt

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We Need Your Help!

We need your help to make the ACP Garden State Chapter Newsletter a success. We are looking for volunteers to submit article ideas, photographs, news of industry events, notices of community events pertaining to emergency preparedness and business continuity. The more information we receive the better the newsletter will be because it will be an effort of the entire membership, not just the views of a few of us that sit on the Chapter Board of Directors. So please, get involved, we need your help!

Are you planning to attend an industry event or local industry event?

- Take your digital camera along and take some photos
- Write a few lines about the event, tell us who attended, names of speakers and topics, etc.

Send your submissions to Bill Michael at bmichael@orcc.com and Michael Isaac at misaac824@yahoo.com.

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ACP Sponsors

The ACP Garden State Chapter would like to take this opportunity to thank the sponsors who helped to make our chapter meetings a success!

