



Importance and Key Elements of a Pool's Own Business Continuity Planning

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Living our business continuity plan

We had a plan.

But how ready were we?



On paper, we checked all the boxes

Met AGRiP Advisory Standards of Business Continuity

- Written policy & procedures
- Identified resources, supplies, alternate location
- Data recovery & accessibility plan
- Contracted vendor (Agility) for business continuity
- Contact information for staff, members, vendors & Board
- Reviewed annually by management
- Emergency response plan, training & regular drills



Outcome: **MODERNIZE – HUMANIZE - TELEWISE**

Cross functional representation

Get acquainted with existing policies, procedures & resources

Evaluate gaps

Break away into program or team level discussions

Compile what we learned



Process: **MODERNIZE – HUMANIZE - TELEWISE**

Revised policies, procedures & resources

To better coordinate a response at an enterprise level

Organization-wide visibility and improved confidence level by ALL staff of their responsibility during an emergency



Role playing

Stretch the
imagination
with real life
scenarios



POOLING

TODAY

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Be warned – it
can get real

- Real conversations about worst case emergency scenarios were riveting
- Not everyone is comfortable in the role of primary response – good to know in advance
- Are families prepared for their loved ones being the primary responder?
- What can we do as an organization to help designated employees prepare themselves and their families for that possibility?

POOLING

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Teamwork & resiliency



**Share current policies,
procedures & resources**



Business Continuity Workbook

Identify critical services
Critical response staff
Critical resources needed
Communications
Recovery process



Broad scope of emergencies:

Natural disaster
Technological
Human caused
(adversarial)

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Surprising outcomes & impacts

Extended duration – beyond 60 days

Staff's mental well-being



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Surprising outcomes & impacts

Multiple events

ERM approach to business continuity



Moving forward

Policies of the future

Post COVID-19 work environment

Communicate expectations to staff

Get to work!



Lessons: Modernize – Humanize - Televised

People Matter

- Less clinical, more humanistic
- All staff will feel confident in their role in any given emergency and may ease anxiety

Perpetual policy review

- test, revise, test differently, seek feedback



Insights & considerations

1. Take another look at your plans now
2. Be sure to include the human component
3. Make sure it's "out there" and shared, readily understood



We have a plan.

We're readier than we were.

We have more to learn.



Questions/Comments?

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