

BAY AREA
PUBLIC–
PRIVATE
PARTNERSHIP
RESILIENCY
INITIATIVE

D DISASTER LOGISTI

For Private Sector EOC Representatives:
Business Operations Center (BOC)
Activation Guide

<This page left intentionally blank>

Table of Contents

I.	Preface.....	1
II.	Using This Document.....	2
III.	Overview.....	3
	A. Business Operations Center (BOC) Function	4
	B. The BOC within ICS and SEMS	4
	C. Benefits of the BOC.....	6
	D. Ethical Conduct.....	7
IV.	Preparation and Activation.....	9
	A. Roles.....	9
	i. Personal Preparation for BOC Private Sector Representatives.....	11
	ii. Training for Private Sector Representatives.....	11
	B. Initial Activation	12
	C. Ethical Conduct of Private Sector Representatives in the BOC	12
V.	Private Sector Representative Toolkit.....	15
	A. Private Sector Representative Position Description.....	15
	B. Summary of the Private Sector Representative Role.....	17
	C. Private Sector Representative Position Checklist	18
	D. Operational Coordination.....	21
	i. Information Sharing	21
	ii. Distribution List and Communication Protocol	22
	iii. Confidentiality.....	23
	E. Logistics and Resource Coordination.....	24
	i. Request and Deploy Private Sector Resources.....	24
	ii. National Retailers: Cal OES MOU Partners.....	25
	iii. Donations Management.....	27
	iv. Good Samaritan Liability Protection Registry.....	27
	Appendix A: Forms.....	29
	Appendix B: Acronyms.....	31

<This page left intentionally blank>

I. Preface

The Bay Area Public Private Partnership Initiative (BAPPPRI) was supported by the California Office of Emergency Services under UASI Grant #s: 2012-SS-00123, OES ID 075-95017 and 2011-SS-0077, OES ID 075-95017, awarded by the US Department of Homeland Security.

The U.S. Department of Homeland Security's (DHS) Urban Areas Security Initiative (UASI) program provides financial assistance to address the unique multi-jurisdictional and multi-discipline planning, organization, equipment, training, and exercise needs of high-threat, high-density urban areas. The UASI program is administered at the federal level by DHS through its Homeland Security Grant Program (HSGP) within the Federal Emergency Management Agency (FEMA). Since its inception in 2003, the intent of the federal UASI program has been to enhance regional preparedness in major urban areas by assisting with supplemental funding to build and sustain capabilities in support of the National Preparedness Guidelines.

The UASI program is the only federal homeland security grant program that requires regional governance, strategic planning and investing involving all disciplines (law enforcement, fire service, public health and medical, public works, critical infrastructure owners and operators, and emergency management) in order to acquire the necessary plans, organization, equipment, training and exercises. In 2006, DHS combined the three previously independent UASIs of San Francisco, Oakland, and San Jose into the current Bay Area UASI. The Bay Area UASI is comprised of twelve counties and three core cities. The twelve counties are inclusive of over 100 incorporated cities and a combined total population exceeding 7.5 million people.

This document is one of three created for the Bay Area as part of BAPPPRI by the California Resiliency Alliance in cooperation with the Regional Catastrophic Planning Team and private sector partners. A special thanks to Santa Clara County, San Mateo County, City of Oakland and City of San Jose for being the first jurisdictions to establish Private Sector Advisory Committees (PSACs) per the BAPPPRI concepts.

II. Using This Document

This Business Operations Center (BOC) Activation Guide describes activities of Private Sector Representatives working in an Emergency Operations Center (EOC) to communicate and coordinate with the business community during a disaster.

It is assumed that the reader is familiar with basic emergency management doctrine, including California's Standardized Emergency Management System (SEMS) and the Incident Command System (ICS).

This guide will help Private Sector Representatives in the BOC:

- **Launch, sustain, support and demobilize a BOC.**
- **Identify the layout, staff patterns and resources required for BOC operations.**
- **Use tools and reference materials to activate a BOC and maintain ongoing public-private partnerships.**

III. Overview

In accordance with FEMA's "Whole Community" approach to crisis response and community and economic recovery, the Offices of Emergency Services (OES) in the counties and core cities of the San Francisco Bay Area, recognize the need for communication, coordination and cooperation among all community stakeholders in the community – those directly involved in emergency management as well as those with an interest in rapid and effective recovery.

When disaster strikes, businesses want to help, but often do not know how. Historically, information and resource sharing activities between the public and private sectors have too often taken place in an ad hoc, isolated, and reactive fashion, resulting in less than optimal assistance to individuals, families, communities, and the economy. The impact of the 2007 and 2008 Southern California wildfires, 2009 H1N1 flu pandemic, 2010 San Bruno gas pipeline explosion, 2011 Occupy protests, and other global emergencies and disasters have emphasized the critical need for the organized synchronous exchange of information and resources between public and private sector organizations in mitigating against, preparing for, responding to, and recovering from disaster events.

In the fall of 2013, the Bay Area UASI engaged the California Resiliency Alliance (CRA) to work in partnership with the Regional Catastrophic Planning Team. Specifically, San Mateo County, Santa Clara County, the City of San Jose and the City of Oakland to help develop robust and sustainable private sector partnerships in the form of Private Sector Advisory Committees (PSACs) and printed guides for additional local governments to follow. The three guides include (1) a Strategic Plan to help guide the work of those Advisory Committees, (2) this Business Operations Center (BOC) Activation Guide for Private Sector BOC Representatives and (3) a Business Operations Center Activation Guide for public sector EOC Staff. These three guides detail processes and advice for establishing long-term and/or ad hoc BOCs in Local government Emergency Operations Centers (EOCs) as well as the ongoing operations of a PSAC. This Strategic Plan lists activity ideas and contains tools for developing a custom PSAC work plan. The PSAC should select and prioritize activities it would like to focus on that benefit local community resilience.

This section of the BOC Activation Guide provides an overview of the purpose and structure of a BOC, how it fits within the SEMS and ICS structure of an EOC, and the benefits of public-private partnerships.

A. Business Operations Center (BOC) Function

During emergency operations (activation), the mission of the **Business Operations Center (BOC)** is to facilitate communication and coordination with the private sector and a government Emergency Operations Center (EOC). A BOC can take on many forms, some of which may be more or less suitable for a given Operational Area or incident. Those include:

- A single desk in or near the EOC where a volunteer or staff private sector representative can assist EOC staff, such as in a city, county (Operational Area) EOC or the Regional Emergency Operations Center (REOC). In some EOCs, this position has previously been called the Business or Industry Representative or Private Sector Liaison. For consistency across EOCs, this guide recommends calling this position a BOC, even if a single representative.
- Conference room in or near the EOC where multiple private sector representatives can assist EOC staff, such as the BOC at the California State Operations Center (SOC) or the BOC in the City of Los Angeles EOC.
- Separate center where multiple private sector representatives can assist the government EOC staff remotely, such as the Business Emergency Operations Center for the New Jersey BEOC Alliance.
- Virtual center where multiple private sector representatives can assist the government EOC staff remotely, such as the National Business Emergency Operations Center.

B. Standardized Emergency Management System (SEMS) and Incident Command System (ICS)

The Standardized Emergency Management System (SEMS) is the unifying cornerstone of California's emergency response system and is designed to improve the mobilization, deployment, utilization, tracking, and demobilization of needed mutual aid resources. SEMS integrates ICS, the California Disaster and Civil Defense Master Mutual Aid Agreement (MMAA), and the Operational Area (OA) concept and is required for managing multiagency and multijurisdictional responses to emergencies in the state.

Incident Command System (ICS) is a standardized on-scene, all-hazards approach to incident management that allows for integration of resources and capabilities and enables a coordinated response amongst participants from multiple jurisdictions, agencies, and sectors. It can be used for a single jurisdictional or multi-jurisdictional incident and is typically structured into five major functional areas: Command, Operations, Planning, Logistics, and Finance / Administration. ICS provides an organizational structure for incident management that is adaptable to the size and scope of a specific incident from field operations to command at an offsite Emergency Operations Center.

The Business Operations Center (BOC) can provide support to local governments in various ways during an emergency or disaster and may be asked to coordinate with different functional areas by different jurisdictions to best fit their ICS structure. With a specific function to connect private sector businesses and infrastructure providers with government emergency management, the functional area within which the BOC falls can even change from incident to incident to most effectively leverage the resources, capabilities, and information dissemination that it facilitates.

How the BOC Private Sector Representative(s) integrates into an EOC through ICS can be different depending on the local government and the incident. Some examples of how Private Sector representatives or a BOC has fit into different ICS sections, includes:

- **Command Staff:**
In some EOCs and during some activations, the BOC Private Sector Representative can act on-site or remotely/virtually in a *Liaison* role working with the *Command Staff*, which traditionally includes the *Public Information Officer, Safety Officer, and other Departmental Liaisons*, that works with the *Incident Commander* to determine operational period priorities and activities. In this role, the *Private Sector Liaison* can provide situational awareness and guidance to the Command Staff and, in turn, will provide information and guidance to the local business communities about the response, recovery status, policies, and priorities as appropriate.
- **Operations Section:**
Utilities are often managed in the Operations Section under ICS. In some EOCs and during some activations, the BOC Private Sector Representative can report to the *Operations Section* as part of a *Community Branch* along with non-profit service providers, and relief agencies. BOC personnel could form a *Group* with the function of working with the affected business community to institute emergency response and recovery operations and monitor resources assigned to support those operations.
- **Logistics Section:**
In some EOCs, the BOC Private Sector Representative could fall under the *Logistics Section*. In that role, the BOC Private Sector Representative(s) supports response and recovery operations in the *Support Branch* responsible for obtaining and maintaining essential personnel, equipment, supplies, and transportation from private sector partners that may not be available through traditional EOC and government emergency response channels. The BOC Private Sector Representative could also work with the Donations Management Unit, if implemented and activated, to help coordinate availability, allocation, and transportation of private sector donations.
- **Public Information Officer (PIO) / Joint Information Center (JIC):**
In some EOCs and during some activations, the BOC Private Sector Representative can be tasked to work with the *Public Information Officer*

and/or within an established *Joint Information Center*. In this role, the BOC Private Sector Representative will communicate vetted and targeted public messaging to the business community to facilitate effective response and recovery. The BOC Private Sector Representative may also be asked to act as a conduit to obtain requested information from the affected business communities around issues like employee safety, business operations, and on-the-ground situational awareness.

C. Benefits of a BOC and Public-Private Sector Partnerships¹

Based on current public-private partnership efforts around the nation, it is clear that ongoing collaboration offers strategic and operational benefits spanning the full range of the emergency management lifecycle. Through public-private partnership in general, and a BOC during emergencies, government (public sector) and the private sector can:

- **Enhance situational awareness.** Rather than rely only on information gathered through standard government structures, all levels of government and the private sector have much to gain through shared situational awareness. This might be through an exchange of structured situation reports between a public and private emergency operations center, or through other formal and informal exchanges like Twitter feeds, verbal accounts, or video and photos submitted by representatives of the private sector. The private sector, too, relies on timely information from the government to make sound business decisions related to operations, customer and employee safety, and communications.
- **Improve decision-making.** The more complete and accurate a picture that can be created, the better decisions government and private sector leaders can make. Ideally, the enhanced situational awareness will move toward real-time capabilities that allow decision-makers to make informed choices based on the most up-to-date, relevant and accurate data.
- **Access more resources.** When the public and private sectors work together, one of the key results is more resources dedicated to making communities stronger and recovering more quickly from emergencies. Resources include not only donated or paid goods and services, but also the intellectual capital that private sector executives bring in the form of strategic and business knowledge.
- **Expand reach and access for communication efforts.** Regular and meaningful communication is vital to the success of any effort. When private

¹ From the DHS Homeland Security Grant Program FY2012, *Supplemental Resource: Support for Public-Private Collaboration*:

sector partners are willing to send a message, article, or other communication through their internal channels - such as organizational websites, newsletters, trade publications, emails, Twitter and Facebook accounts, and messaging systems - they help increase access to vital information by people who may need it.

- **Better coordination with other efforts by segments of the private sector.** No matter what stage of the emergency management cycle, the private sector has a related piece of the puzzle. Close collaboration and coordination through ongoing partnership efforts will support effective planning, preparedness, and response by all participating members of a public-private partnership.
- **Increase the effectiveness of emergency management efforts.** Public-private partnerships increase transparency and understanding by all parties involved. For example, people may be more likely to take appropriate action when they learn of it through their employer. In addition, government efforts can be more effective when they are based on a true understanding of private sector capabilities, limitations, and requirements.
- **Maintain strong relationships, built on mutual understanding.** The value of good working relationships has been proven repeatedly during emergencies of all types. Many public-private partnerships have been established only after the community has experienced the impact and lengthy recovery after an uncoordinated response to major disaster. Other partnerships have evolved after learning from the lessons of their peers. Either way, it is essential that all stakeholders involved in a response have established relationships long before something happens. The result is faster, more effective response and recovery.
- **Create more resilient communities and increase jurisdictional capacity to prevent, protect against, respond to, and recover from major incidents.** The effort that government and private sector partners contribute toward collaboration, coordination and communication throughout the year pays dividends and can be measured in the resilience of a community to all hazards. Collaborative cross-sector planning can facilitate economic recovery, community restoration, and a return to normalcy.

<This page Intentionally Left Blank>

IV. BOC Roles and Responsibilities

This section of the BOC Activation Guide provides an overview of the roles and responsibilities within a BOC, including required training and conduct.

A. Roles

- **BOC Liaison.** The BOC Liaison should be an OES employee or designee of the EOC Director, and may be the Liaison Officer working with multiple agencies. The level of participation will be dictated by response needs. The BOC Liaison will work with the appropriate EOC staff and BOC to ensure that BOC and EOC needs are being addressed and effective coordination occurs. However, this does not preclude BOC representative(s) from interacting with appropriate ICS functions.
- **BOC Team Leader.** One of the BOC Private Sector Representatives will be designated as the primary contact for each EOC. The Team Leader will be responsible for:
 - Being the initial responder to an activation of the EOC, if possible;
 - Work with Logistics/Personnel Rep to schedule additional BOC Private Sector Representatives for shifts as necessary during the period of activation of the EOC;
 - Assisting with the preparation of a final or after-action report when the EOC is either deactivated or private sector representation is deemed no longer necessary.
- **Private Sector Advisory Committee (PSAC).** The PSAC, if previously established, is composed of larger employers, associations, and small business networks, and is intended to facilitate ongoing collaborative local cross-sector planning between businesses and OES. During activation, the Advisory Committee receives and relays information from the BOC to the broader business community.

The PSAC will improve community resilience and the ability to effectively recover by:

- Providing strategic advice to OES and other appropriate government agencies before disaster strikes on issues of importance to the business community and in support of economic and community resilience and post-disaster recovery;
- Holding regular recurring meetings that include representatives from OES and other government agencies to continually build relationships, trust, and capabilities over time, in preparation to work together more

- effectively in times of crises. Quarterly meetings are recommended in order to gain familiarity with OES staff and the EOC;
- Assisting OES by undertaking projects and exploring issues of a strategic nature to help inform emergency response and recovery operations;
 - Acting as an advocate to help disseminate information about volunteer opportunities such as BOC Private Sector Representatives in the EOC during times of crisis response and recovery;
 - Creating a network to share information with local business communities in preparation for or during emergency response and recovery. Compiling email addresses well ahead of the event to avoid sending large distribution emails that risk going directly into spam folders.

Further information regarding the PSAC can be found in the accompanying guide, *Coordinating a Private Sector Advisory Committee: Strategic Plan*.

- **Private Sector Representative.** Representative(s) in the BOC will facilitate communication and coordination with the private sector. They represent the interests of the business community of the jurisdictional Operational Area in which they are working. Interests addressed may not necessarily be that of their specific employer and activities will likely be outside of their day-to-day responsibilities.

The BOC Private Sector Representative is similar to an *Agency Representative*² as defined in Incident Command System. In most cases, the Private Sector Representative will not represent any single company or agency. Instead, he or she acts in a *cooperating* role representing the interests and capabilities of the larger business community that operate within the EOC's jurisdiction.

As previously described, the Private Sector Representative may operate as a single individual or as part of a larger BOC team, in a specific predetermined ICS role (i.e. as part of the Community Branch in Operations or as part of the PIO's office or JIC) or as a separate co-located or onsite entity. The Private Sector Representative also differs from an Agency Representative in that he or she *does not* have the authority to make decisions on behalf of the business community that he or she represents. Instead he or she acts as a conduit for the flow of two-way communication or as an intermediary in the case of resource requests, connecting the resource provider and resource

² *Agency Representative* is defined in ICS as an individual assigned to an incident from an *assisting agency* (i.e., one that directly contributes tactical or service resources to another agency) or a *cooperating agency* (i.e., one that supplies assistance other than direct tactical or support functions or resources to the incident control effort) imbued with the authority to make decisions on matters affecting that agency's participation at the incident. Agency Representatives traditionally report to the Incident Command Staff Liaison Officer.

with the appropriate Incident Command Staff Liaison Officer or EOC Command and/or General Staff Logistics personnel.

i. Personal Preparation for BOC Private Sector Representatives

In order to be most effective Private Sector Representatives should be prepared with resources and tools that will assist them to support EOC operations:

- Prepare and secure your home, family, and business matters prior to reporting to the EOC.
- Dress in comfortable (but professionally suitable) attire. Bring along any personal items that you may require during your shift such as medications or special dietary items, etc.
- Communicate email addresses ahead of the event in order to avoid sending large distribution emails that risk going directly into spam folders.
- Take your personal cell phone and chargers for your own use or as back-up in the event of communications problems with the EOC.
- Take your personal laptop, in case a PC is not available in your EOC.
- Bring this Activation Guide, either hard or soft copy.

ii. Training for Private Sector Representatives

Training is required for all BOC Private Sector Representatives to begin working in their designated EOC. Training requirements to work in the EOC are determined by the EOC Coordinator.

- *Required* - Online ICS classes available anytime on www.fema.gov:
 - IS 100b Introduction to Incident Command System (ICS 100);
 - IS 200b ICS for Single Resources and Initial Action Incidents;
 - IS 700 National Incident Management System (NIMS): An Introduction;
 - IS 800 National Response Framework: An Introduction;
- *Required* - Live training offered by OES:
 - EOC101 – EOC Orientation
 - EOC information management tool training session (e.g. WebEOC)
- *Recommended* - Position-specific training for BOC Private Sector Representatives:
 - The CRA conducts a webinar periodically throughout the year as necessary, usually prior to annual statewide exercises led by Cal OES
 - IS-660 Introduction to Public-Private Partnerships (FEMA online)
 - IS-662 Improving Preparedness and Resilience through Public-Private Partnerships (FEMA online)

B. Initial Activation

If the EOC is activated and the EOC Director determines that BOC support would be helpful, OES will contact the BOC Team Leader. If the BOC Team Leader is not reachable, then the OES may either contact alternate BOC Private Sector Representatives on the team or the California Resiliency Alliance (CRA) to request a representative to report to the EOC.

The BOC Team Leader (or alternate or CRA in his or her absence) will determine which private sector representative should report to the EOC. You will most likely be notified of the need to report to the EOC by a phone call from the BOC Team Leader, CRA or EOC. You may have received notification of an event that precipitates activation of the EOC in an alert via the county alert system or news report. Do not self-deploy, but contact your BOC Team Leader or CRA representative to determine if or when the BOC will be activated and which personnel will report.

If requested by the BOC Team Leader, CRA or EOC, your primary responsibility is to report to the EOC as soon as possible. Depending on the nature of the incident, you should verify that you can safely report to the EOC. In the event that you cannot, contact your BOC Team Leader, who will determine if another volunteer assigned to the EOC is able to do so.

In the event that no assigned BOC private sector representatives can reach the EOC, the BOC Team Leader and the CRA may be able to deploy a private sector representative from another Bay Area EOC

C. Ethical Conduct of Private Sector Representatives in the BOC

BOC Private Sector Representatives, or their affiliates, will not use the BOC to promote any organization, institution, product or service, whether charitable or for profit. Nor will the representatives or their affiliates use or share any contact information collected by the BOC for any purpose other than the accomplishment of the documented goals.

BOC Private Sector Representatives serve the local government OES on behalf of all businesses in their respective sectors and industries. Private Sector Representatives shall act as trusted agents and honest brokers to ensure that all information sharing, resource management, and other operational decisions are made and carried out impartially and without bias toward or against any organization.

BOC Private Sector Representatives should not represent themselves as government personnel or representatives of the government. They should represent themselves as private sector partners working in conjunction with the government with the purpose of assisting in and facilitating business participation in incident response and recovery.

- **Sensitive/Confidential Information.** It is expected that all BOC Private Sector Representatives not share confidential or proprietary information issued by the local government OES, other agencies, or that may be available from another private sector partner. For example, confidential information specific to a power outage, will not be shared outside of the EOC unless approval is obtained from the utility provider, EOC Staff Liaison to the BOC ("BOC Liaison" see Roles) or PIO/JIC in coordination with the EOC Director, or is included in a publicly available situation report or webpage that has been vetted for sensitive information.
- **Resource Gaps.** The BOC is not meant to replace resources or resource allocation management systems available from existing vendors on a procurement basis. The BOC is intended to support government by information sharing and identifying private sector sources that cannot be filled through existing vendor lists, other authorized sources or available local government channels.

<This page left intentionally blank>

V. Private Sector Representative Toolkit

The information below is useful for all Private Sector Representatives in preparing for and understanding their role during activation in the Business Operations Center (BOC) at the local government Emergency Operations Center (EOC). Local government EOC staff should provide the Private Sector Representative with specific information about their EOC operations.

A. Private Sector Representative Position Description

EOC Activation: The EOC may be activated in situations where coordination is imperative for effective response to an emergency event, security threat, or extended weather or energy condition. These events include, but are not limited to earthquake, extreme heat or cold, severe storm, extended or widespread utility emergency, major building fire or emergency, major hazardous materials event, terrorist attack, large-scale civil disorder or a planned special event.

Private Sector - EOC Liaison Participation: During certain emergencies, the private sector may be requested to staff a position at the EOC, either in physical or virtual presence. This includes emergencies where private institutions are threatened or affected by a condition or event or may be asked to provide / coordinate additional resources through the private sector network. The Business Operations Center (BOC) and/or Private Sector Representative will act as a conduit of information and guidance between the Operational Area and local private sector organizations. The Representative's role is to gather status reports and information from critical private sector constituents, provide this information to the EOC Plans, Operations and Logistics Sections, and disseminate information efficiently and effectively to various constituents and stakeholders.

The Private Sector Representative is requested to staff a regular EOC work shift, which is usually from 6:00 AM to 6:00 PM or from 6:00 PM to 6:00 AM. The EOC Representative reports to the EOC Liaison Officer, in the Command/Management Section for that specific EOC. Based on liaison availability, representatives may split shifts and/or be available by telephone.

Private Sector Representative Responsibilities:

- Assess and track the status of private sector problems and needs. Assess the impact to the private sector of problems reported by other entities.
- Gather information on private sector operations by phone, fax, email, internet, news media, and other means available.
- Provide the EOC with information regarding private sector issues (key operational timelines, facility locations, building access needs, transportation issues, relocation logistics, security issues, recovery priorities).

- Make resource offers on behalf of the private sector to the EOC, as resources become available.
- Provide information for EOC status reports as requested.
- Disseminate relevant information and guidance from the EOC to private sector contacts, as authorized.
- Provide brief verbal status updates as requested regarding the health of the private sector and key infrastructure providers.
- Provide a shift change report/briefing to the next Private Sector Representative on duty.
- Participate in meetings and conference calls as needed during the shift.

Qualifications:

- Familiarity with the names and types of local, regional, national private sector organizations and functions.
- Working knowledge of ICS, SEMS and NIMS emergency management systems (training will be made available at no cost to liaisons). Training must be completed prior to work in EOC.
- Familiarity with your assigned EOC, reporting structure, culture, and chain-of-command through attendance at an orientation or training session arranged through the lead liaison.
- Strong oral, written and interpersonal communication skills.
- Good problem solving, assessment and evaluation skills as well as being well organized and prepared. Ability to make timely decisions.
- Strong computer skills, including proficiency with word processing and spreadsheet programs.
- On-call staff must be within one hour travel time to their designated EOC, if activated.
- It would be desirable for candidates to be able to make this commitment a high priority realizing that there may be times and circumstances where they have to draw their undivided attention toward their own professional and personal priorities. In these cases, other volunteers for that EOC or neighboring private sector representative volunteers would cover the absence.

B. Summary of the Private Sector Representative Role

For more information, refer to the Position Checklist on the following page and the BOC Operational Considerations section.

Task	Suggested Actions
Arrival/set-up	<p>Report into BOC Liaison or EOC Coordinator. Set up computer and phone.</p> <p>Notify the Advisory Committee and CRA with your contact info.</p> <p>Start an Activity Log which helps the next shift.</p>
Send a Situation Report (SitRep) each shift	<p>Get briefing from Liaison Officer or Section Chief.</p> <p>Obtain the EOC's most recent SitRep or fill out template SitRep.</p> <p>Include utility status and road closure info.</p> <p>Filter law enforcement sensitive info (#s of officers) and confidential info (like company names).</p> <p>If public health risk, ask for workplace safety guidance.</p> <p>If banks request impacted zip codes, ask GIS in Planning Section.</p> <p>Monitor social media.</p> <p>Send a SitRep each shift to the Advisory Committee and CRA.</p> <p>NOTE: All information to be disseminated outside the EOC MUST BE APPROVED BY THE PIO or his/her designated agent before being released.</p>
Introduce yourself	<p>Meet Logistics Chief and team. Meet utility representatives.</p> <p>Meet American Red Cross and non-profit representative (such as CADRE, CARD, VOAD, THRIVE).</p>
Resource request	<p>From Logistics Section. Log contact info, mission #, delivery address and rationale in Activity Log.</p> <p>Check Resource Table. Send request to the [Advisory Committee and CRA], and follow up later with if no response.</p>
Resource donation	<p>Log donor contact info, location, availability, and transportation needs/ETA in Activity Log.</p> <p>Report to Logistics Section, Donations Management Unit.</p>
Resource deployment	<p>Ask Operations Section for road closures (law enforcement or county transportation agency) and send to resource provider or donor.</p>
Organize conference call for businesses	<p>Consider starting day 2. Talk to BOC Liaison, must be coordinated with and approved by the PIO.</p> <p>Send dial-in info to the Advisory Committee and CRA for distribution to business networks.</p>

C. Private Sector Representative Position Checklist

The following checklist and table are intended to help a BOC private sector representative assist in a government Emergency Operations Center (EOC):

Initial Activation:

- Sign-in at the sign-in desk.
- Obtain activation vest. Ensure that the vest is the correct color corresponding to the appropriate ICS function and that the BOC label and your name are visible.
- Check in with the EOC Coordinator or BOC Liaison and obtain briefing.
- As time permits, introduce yourself to the Logistics section, non-profit, American Red Cross, and other agency representatives for the purpose of identifying potential private sector resource requests and collaboration.
- Start an Activity Log (see Appendix C for a template) or use the log sheet supplied by the EOC.
- Inform the BOC Team Leader, local Private Sector Advisory Committee (PSAC), local industry partners, and BOC representatives at the Cal OES Coastal Region EOC (REOC) and State Operations Center (SOC), if activated and staffed, that you are activated in the local EOC and provide contact information.
- Collect as much information as possible regarding the current situation and potential or anticipated resource requests. Create a Situation Report for dissemination to the business community. You can use an existing operational period Situation Report that has been vetted for public dissemination or create one (see Appendix C for a template). Be sure to delete confidential, proprietary, and sensitive information and to review the Situation Report with the Public Information Officer (PIO) before dissemination. **NOTE: All information to be disseminated outside the EOC MUST BE APPROVED BY THE PIO or his/her designated agent before being released.**
- Make contact with the BOC in the Cal OES Coastal Region EOC (REOC) and State Operations Center (SOC), if activated and staffed. Ask BOC Liaison or CRA for REOC and SOC contact info.
- Log into and obtain instruction in using any EOC information management system(s) that might be in use, e.g. WebEOC.
- Review mission requests, usually found within the EOC information management system in use.
NOTE: BOC Private Sector Representatives should not create missions unless specifically requested to do so by EOC Command or designated agent.

- Assess BOC staffing needs and work with BOC Liaison or EOC Planning representative to approve BOC staffing pattern for current and anticipated operational periods, as necessary.

Sustained Operations:

- Determine from the BOC Liaison the operational period, frequency of situation reports, conference calls, planning meeting schedule, etc. to support EOC activities.
- Send situation reports, guidance, maps, and resource requests to external stakeholders, as appropriate. Conduits for that information may include the Advisory Committee and the CRA (see Annex for contact information). **NOTE: All information to be disseminated outside the EOC MUST BE APPROVED BY THE PIO or his/her designated agent before being released.**
- Provide status reports (resource allocation, critical infrastructure concerns, etc.) in coordination with the BOC Liaison to be shared with the Planning/Intelligence Section for inclusion in the Situation Report, EOC Director and JIC. Point out any sensitive information. Sensitive information will only be shared with the appropriate Chief positions, EOC Director and entities with a direct response role, if applicable.
- Assist with fulfilling resource requests in coordination with the Logistics Section. Check that existing Operational Area and local approved vendors have been contacted.
- Ensure all BOC mission coordination is shared with the BOC Liaison. Make notes in an Activity Log or mission tracking spreadsheet (see Appendix C for template).
- Encourage donors to register with the Cal OES Limited Liability Registry when donating resources.
- Coordinate business outreach messages with the BOC Liaison and JIC/PIO.
- Establish coordination with EOC functions as necessary.
- Work with American Red Cross, Department of Social Services and other appropriate stakeholders to assist with shelter needs, if applicable.
- Maintain communications with the BOC representative in the Coastal REOC and/or SOC BOC, if activated.
- Establish conference call schedule with external stakeholders, if applicable.
- Participate in briefings/meetings, as requested.

- Brief the BOC Liaison on a regular basis. Immediately report information regarding limited resource concerns, sensitive information, unusual activities, etc.
- Monitor WebEOC and any other communication and resource management tools (e.g.: Aidmatrix's Donation Management network – www.aidmatrixnetwork.org, California Resiliency Alliance Emergency Network – www.craen.org) that might be in use to manage potential information and resource requests.
- Answer BOC main phone line, check BOC email, fax, and social media on a regular basis.
- Brief the next shift's BOC Private Sector Representative and transfer the Activity Log.

Demobilization:

- Complete and send a final Situation Report, which you should label as a "Final Report."
- Inform the BOC Team Leader that your presence is no longer required.
- Close out or re-assign any open resource requests.
- Leave notes and Activity Log with BOC Liaison.
- Make "hot wash" notes on what went well and areas of improvement for the After-Action Report.
- Return your vest, supplies, and any EOC equipment and sign-out.

D. BOC Operational Considerations

The key functions of the BOC are to share information including situational awareness from OES to help businesses, and to coordinate private sector resources in order to provide adequate support for local needs during an event.

i. Information Sharing

Businesses need information during a disaster to make employee safety, business continuity, and community assistance decisions. The BOC Private Sector Representative compiles and shares this information:

- *Situation Reports (SitReps)* – During an emergency activation, activated local, regional, and state EOCs typically generate a Situation Report each shift. These SitReps often include status of response, injuries and damage estimates, utility restoration, road closures and shelter locations, and are very useful to businesses.
 - It is important for the BOC Private Sector Representative to ascertain whether the information contained in the SitRep has been vetted to determine what, if any, of the information contained therein is to remain confidential per the "Confidentiality" section below and which is available for distribution to businesses.
- *Guidance* – Depending on the nature of the emergency, certain government departments provide information useful for employee safety through their Public Information Officer (PIO) or Joint Information Center (JIC).
 - Public health departments often provide guidance during health emergencies like H1N1 in 2009 or hazardous releases, such as radiation risk after the Japan earthquake and tsunami in 2011.
 - The County's Office of Education may provide information on school closures that impact the ability of the workforce to resume working.

"One of the most basic issues for the private sector is obtaining up-to-date information on infrastructure status (e.g., roads, water, power, etc.). Businesses need to know if it will be safe to send employees home, or to another location. Timely distribution of information to business members concerning road conditions (e.g., roads, highways, tunnels, bridges, etc.), BART, various public transit agencies and airports is very important and should be a priority."

– Golden Guardian '06 observer

- The PIO, JIC or law enforcement may provide information on protests or civil disturbances that may impact commercial or retail businesses, such as during the Occupy protests of 2011.
- *Continuity Issues and Supply Chain / Lifeline Restoration* -- Businesses may contact the BOC Private Sector Representative for assistance with key personnel, supplies, fuel or equipment that may need to enter restricted areas or during curfew hours to keep critical operations running.
- *Business Status for the EOC* – EOC management may ask the BOC Private Sector Representative to request, collect and compile information from businesses, such as damage estimates.
 - After the Mehserle Verdict in 2010, the REOC needed to know if grocery stores were open and if businesses were planning to open as usual the following morning.
- *Specific Questions* – Businesses may sometimes contact the BOC Private Sector Representative for specific information related to their operations.
 - During the Asiana plane crash at San Francisco Airport in 2013, for example, a company needed information about which area hospitals its employees had been taken. They were unable to access that information through publicly announced information channels. Working through the Private Sector Representative, they were able to efficiently obtain the information needed for their employee health and safety operations.
 - BARCfirst, the Bay Area banking coalition, often requests zip codes of evacuation zones so that banks can identify employees and customers impacted by the emergency.

ii. Distribution List and Communication Protocol

The BOC Private Sector Representative should distribute SitReps, guidance and any other information that might be helpful to businesses through the following networks:

- The Private Sector Advisory Committee, which includes key employers, associations such as Chambers of Commerce and Building Owners and Managers (BOMA), and representatives from key industry segments such as transportation (FedEx), hotels/apartments, and pharmacies (Walgreens). Contact information is listed in the Annex.

During Superstorm Sandy in October 2012:

- *BOMA-NY texted 67 alerts to building managers*
- *The All Hazards Consortium provided gas station status*
- *Google Crisis Maps displayed status of expected power restoration*

- The California Resiliency Alliance (CRA) which will, as appropriate, share the information with Cal OES MOU partner businesses, regional business continuity associations such as the Business Recovery Managers Association (BRMA), BARCfirst banking coalition, the Association of Contingency Planners (ACP), and businesses around California. The CRA's contact info is SitRep@CAresiliency.org and 415.830.4230.
- Any information sent out should be reviewed and edited for confidential or sensitive information per the "Confidentiality" section below.

iii. Confidentiality

The BOC Private Sector Representative(s) should review and edit any information for confidential or sensitive information per the following guidelines:

- BOC Private Sector Representative will consider information that is provided by their respective peers during or after an activation to be considered confidential or proprietary and to be shared only as appropriate.
- Sensitive information shared outside of the EOC must be approved by the BOC Liaison and Public Information Officer (PIO)/Joint Information Center (JIC) prior to distribution.
- It is expected that all BOC Private Sector Representatives not share confidential information issued by OES or other agencies that may be available from another BOC partner. For example, confidential information specific to a utility should not be shared outside the BOC unless approval is obtained from the utility, PIO/JIC or released in a Situation Report.
- If a BOC Private Sector Representative is contacted by any media representative, it is expected the representative will refer the media representative to the JIC/PIO.
- Information from businesses that qualify as critical infrastructures under National Policy directives may be protected under PCII (Protected Critical Infrastructure Information) and HIPAA (Health Insurance Portability and Accountability Act) rules.

Public Records Act:

In general, records held by state or local government are public records. There are numerous exceptions to this general rule that have to be considered on a case-by-case basis. As a "guest" of OES using its facility and systems (e.g. WebEOC, computers, e-mail, etc.), BOC records may be considered public, unless some other exemption applies, e.g., records whose release would violate the privacy rights of identified individuals or where an explicit federal *Freedom of*

Information Act (FOIA) exemption against the release of a particular type of information applies.

E. Logistics and Resource Coordination

i. Request and Deploy Private Sector Resources

The BOC Private Sector Representative helps coordinate resource requests to business networks and facilitate deployment of business donations that can address community needs. The representative(s) perform the following tasks to facilitate resource coordination:

- 1) Work closely with the Logistics Section to monitor resource requests that businesses might be able to assist in either donating or providing.
 - o To avoid duplication of effort on the same resource request, the representative should check with the Logistics Section and Care and Shelter (American Red Cross).
- 2) Relay resource requests to the appropriate business, Advisory Committee, business network (such as the CRA) or SOC BOC to find a donor or provider.
- 3) Facilitate the deployment of the requested resource by providing open route information to the donor and provider or arranging transportation, if needed, with the help of the Logistics Section and networked transportation / logistics providers.
 - o The representative may need to provide the following information to the donor or provider, the transportation agency and law enforcement at the borders of the impacted area: Who authorized the delivery of resources (name, agency, contact information), resource description, where resource will be delivered, and other pertinent information to ensure the shipment can reach its destination.
- 4) Track resource requests and deployment in the Activity Log, so that later shift representatives can make sure open requests are fulfilled. The representative must record mission task numbers if reimbursement is expected by the provider.

During the San Bruno Gas Pipeline Explosion in Sept. 2010:

- Google provided a geo-mapping team to map the damaged homes
- Cisco deployed its NERV vehicle to provide Wi-Fi and connectivity for responding organizations
- 3M donated office supplies to the Local Assistance Center

The BOC Private Sector Representative is not meant to replace resources available from existing vendors on a procurement basis. The BOC is intended to support government by identifying private sector sources that cannot be filled

through existing vendor lists or other authorized sources. The Private Sector Representative should check with the logistics section for a list of Operational Area vendor lists. *BOC Private Sector Representatives are also not professional logisticians, but can assist EOC Logistics Section staff.*

ii. National Retailers: Cal OES MOU Partners

During an emergency, while most national retailers want to assist with resources and capabilities, many prefer to receive and coordinate resource requests through the Business Operations Center (BOC) at the State Operations Center (SOC) rather than working with multiple affected Operational Areas or cities, even if the retailer may have locations, employees, and customers in the local area. Many of these companies have a corporate Emergency Operations Center that manages critical incidents that may occur. The California Office of Emergency Services (Cal OES) has Memoranda of Understanding (MOU) with global business and non-profit organizations that include:

- WalMart
- Target
- Home Depot
- Lowe's
- California Grocers Association
- Bank of America
- Wells Fargo
- Gap Inc.
- Direct Relief
- UPS
- Grainger
- Sears
- San Francisco Helicopters
- California Resiliency Alliance

The complete and current list is on the Cal OES website [www.Cal OES.ca.gov](http://www.CalOES.ca.gov) - under Infrastructure Protection (<http://www.CalOES.ca.gov/InfrastructureProtection/Pages/MOUS.aspx>).

- Resource requests meant for Cal OES MOU partners should be submitted to the State Operations Center by official channels, including WebEOC.
- If the BOC at the REOC or SOC is not activated, these MOU partners may be reached through Cal OES or the California Resiliency Alliance (415.830.4230).

At the SOC, the California Utilities Emergency Association (CUEA) operates the *Utilities Operations Center (UOC)*, which coordinates not only power, gas, water and wastewater utilities, but also telecommunications (cellular and wired), and fuel (in conjunction with the California Energy Commission). In addition, the REOC includes a utilities representative.

Below is a sample *Private Sector Resource Table* representing resources available to Private Sector BOC Representatives at the BOC at Cal OES' SOC. Private Sector BOC Representatives and the BOC Liaison that support the local government EOC can work with their government partners to create one for their jurisdiction.

SAMPLE PRIVATE SECTOR RESOURCE TABLE – Cal OES BOC

Resource	Suggested Provider or Donor
Bottled water, food	California Grocers Association rep in SOC Business Operations Center can contact Safeway, Whole Foods, CostCo, independent grocers, food suppliers and bottlers like Nestle Water.
Supplies (hardware, clothing)	SOC BOC coordinates with Target, WalMart, Home Depot, Lowe's, Grainger, Sears and Gap. Pet supplies from Petco Foundation. Target's corporate EOC may be contacted only if SOC or REOC BOC are not activated (c3@target.com , 24x7 phone (612) 761-1500).
Pharmaceuticals	Walgreen's on Advisory Committees. Direct Relief International thru SOC BOC. McKesson via CRA or BRMA. 3M (N95 respirators) thru CRA. Rx Response thru PhRMA association in Wash DC (www.RxResponse.org).
Generators	Small generators from Home Depot, Lowe's, WalMart via SOC BOC Large generators from SOC Utilities Operations Center (UOC). Los Angeles movie studios may loan generators (contact HSAC, LAEPF or BICEPP).
Mobile ATMs, banks	BARC/first, or Bank of America and Wells Fargo via SOC BOC or CRA.
Wi-Fi Internet, PCs, servers, geo-mapping	Cisco Systems Tactical Operations (TacOps) (919) 392-4646 emergencyresponse@cisco.com . Intel may donate PCs & servers for shelters. Google may provide a crisis map.
Cell phones, Telecommunications	Disposable cell phones from Target, WalMart thru SOC BOC. Wireless cell providers (ATT, Verizon, Sprint) thru SOC Utilities Operations Center (UOC).
Transportation or warehousing	FedEx on Advisory Committee. UPS thru SOC BOC, ConWay thru CRA. American Logistics Aid Network (ALAN) thru CRA. Shuttle bus vendor list via Metropolitan Transportation Commission (MTC).
Fuel	Fuel and refinery operators work with the California Energy Commission that coordinates with the Utilities Operations Center (UOC) at the SOC. Fuel companies also work with industry associations like CRA or BRMA.
Help for Impacted Businesses	U.S. Chamber of Commerce Business Civic Leadership Center (BCLC) Help Desk 888-MY BIZ HELP or 888-692-4943 bclchelpdesk@uschamber.com . U.S. Small Business Administration Disaster Field Operations Center 916-735-1500 or 800-488-5323.

iii. Donations Management

In Operational Areas that have implemented the Regional Donations Management Plan, OES may work with a designated agency during disasters to manage donations. The BOC Private Sector Representative can support the Logistics Section to coordinate in-kind donations and monetary donations from local businesses.

- Monetary donations should be referred to the local designated foundation if the OpArea has implemented the Regional Donations Management Plan, or California Volunteers (www.californiavolunteers.org) which will list charities and response organizations involved in disaster response.
- In-kind donations should be captured in an appropriate database or log and will be coordinated through the Logistics Section, Donations Management Unit. The EOC may use this database in locating resources. An example is Aidmatrix's Donation Management network – www.aidmatrixnetwork.org.

iv. Good Samaritan Liability Protection Registration

Potential corporate donors should be informed that pursuant to California Government Code Sections 8588.2 and 8657.5, the California Liability Registry was developed to enable the state to provide limited liability protection to private businesses and non-profit organizations that are interested in donating services, goods, labor, equipment resources, dispensaries, or other facilities at no cost to state governmental entities or the victims of emergencies and disasters. A donor must be registered within the registry in order to be protected under the Government Code mentioned above.

Registration in the program does not obligate a business or non-profit organization to donate. Participants in this registry are encouraged to carefully review the law and consult with their legal counsel. The liability protection provided by participation in this registry is limited. Also, the protection afforded by participation in this registry requires compliance with all statutory requirements that apply.

- The BOC Private Sector Representative should recommend that donors register on Cal OES's webpage www.CalOES.ca.gov under Infrastructure Protection (<http://liabilityregistry.calema.ca.gov/>).
- The registry is another tool that may be used in locating needed resources.

< This page Intentionally Left Blank >

Appendix A: Forms

Activity Log (ICS 214)

Situation Report Template (ICS 209)

Reported By	
Date / Time	
Care and Shelter (Food, water, clothing, shelter locations, animal welfare)	
Damage Assessment	
Fires / Hazmat	
Infrastructure (Communications, Power, Water/ Wastewater)	
Medical / Health (Injuries, Deaths, staffing or facilities issues)	
Resources Available	
Resources Needed	
Transportation (Highways / Roads, Bridges, Rail, Buses, Mass Transit)	
Miscellaneous	

Appendix B: Acronyms

Acronyms

ACS	Alternate Care Sites or Auxiliary Communications Service
ARC	American Red Cross
ARES	Amateur Radio Emergency Services
BOC	Business Operations Center
CAHAN	California Health Alert Network
Cal Fire	California Department of Forestry and Fire Protection
Cal OES	California Governor's Office of Emergency Services
Caltrans	California Department of Transportation
CBO	Community Based Organization
CCC	California Conservation Corps
CDC	Centers for Disease Control and Prevention
CERT	Community (or Corporate) Emergency Response Team
CHP	California Highway Patrol
CISN	California Integrated Seismic Network
CONOPS	Concept of Operations
DOC	Departmental Operations Center
DWR	Department of Water Resources
EMAC	Emergency Management Assistance Compact
EMS	Emergency Medical Services
EMSA	Emergency Medical Services Authority
EMT	Emergency Medical Technician
EOC	Emergency Operations Center
ETA	Estimated Time of Arrival
FEMA	Federal Emergency Management Agency
FOG	Field Operations Guide
HICS	Hospital Incident Command System
IAP	Incident Action Plan
IC	Incident Command or Incident Commander
ICS	Incident Command System
IED	Improvised Explosive Device
JIC	Joint Information Center
JFO	Joint Field Office
LSA	Logistics Support Area
MHOAC	Medical Health Operational Area Coordinator
MOU	Memorandum of Understanding
MRC	Medical Reserve Corps
MRE	Meal, Ready-to-Eat
NIMS	National Incident Management System
OA or OpArea	Operational Area (county)
OES	Office of Emergency Services
PIO	Public Information Officer

POD	Point of Distribution or Point of Dispensing
PPE	Personal Protective Equipment
RACES	Radio Amateur Civilian Emergency Services
RCPGP	Regional Catastrophic Preparedness Grant Program
REOC	Region Emergency Operations Center
SEMS	Standardized Emergency Management System
SOC	State Operations Center
SOP	Standard Operating Procedure
UASI	Urban Areas Security Initiative
VOAD	Voluntary Organizations Active in Disasters

<This page left intentionally blank>



Produced by the Bay Area UASI
<http://bayareauasi.org/>