



Proposal For



City and County of Durham

Continuity of Operations Planning (COOP)

May 11, 2017

Submitted by
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What's Your Plan?

Cover Letter

BOLDplanning, Inc. is pleased to submit the following proposal to assist the City and County of Durham with the development and maintenance of FEMA compliant Continuity of Operations Plans. Since before the September 11 attacks and the destruction of Hurricane Katrina, BOLDplanning has worked primarily with local and state governments and agencies to improve and streamline the continuity and emergency planning process. We know that every organization is different and yet each struggles with similar issues when preparing for natural or man-made hazards.

- Life Safety
- Emergency Operations
- Continuity of Operations
- Risk Assessments
- Communications
- Incident Command System
- Business Continuity
- Hazard Mitigation Planning
- Evacuation and Shelter-in-Place
- Pandemic and Health

BOLDplanning will provide your county with a full package of subject matter expertise, software tools and proven project management to ensure the development of a strong internal response team and detailed, compliant planning elements. Our process is unique and successful because it is centered on three distinct elements. Each one is critical by itself but combined they result in better plans in less time!

1. **Our Technology** – Our cloud-based planning system has been continuously deployed for over 12 years and is currently being used by over 8,500 organizations across the country.
2. **Our Methodology** – Our best practices for training and project management have been developed and refined in the real world. This proven process is well-documented, flexible and easily implemented with large or small entities.
3. **Our Experience** – Our years of direct contact with thousands of management and operational staff makes us who we are! We combine this field experience with the continuous study of a wide range of government and industry standards for our unique subject matter expertise.

BOLDplanning invites you to consider our proposal. We think you will agree with the thousands of emergency managers, IT professionals, facility managers, and chief executives that BOLDplanning is the best solution available for continuity planning. We thank you for the opportunity to submit this proposal and look forward to discussing it with you in more detail.



Fulton Wold, CEO
BOLDplanning, Inc.

Overview and Software Description

BOLDplanning focuses exclusively on Continuity of Operations Planning, Continuity of Government (COG), Emergency Operations Planning (EOP), and Hazard Mitigation Planning (HMP) for government emergency managers. Over 90 percent of our current work is for local and state government. We bring an unmatched combination of subject matter experts, real-world experience and cutting-edge technology to each project. We track National Fire Protection Association (NFPA) 1600 and all federal guidance from Department of Homeland Security (DHS)/Federal Emergency Management Agency (FEMA) for our planning projects including National Incident Management System (NIMS), the National Response Framework, Comprehensive Preparedness Guides (CPG) 101 & 201, Federal Continuity Directive (FCD) 1 and 2, Continuity Guidance Circular (CGC) 1 and 2, and all other current documentation. BOLDplanning submits that we are uniquely qualified to complete projects on time, within budget, and with more efficiency than other options.

BOLDplanning Methodology for planning is proven and is currently in use by over 8,500 organizations across the country including large, urban jurisdictions such as Chicago, Denver, Atlanta, Charlotte, and Portland. In addition to these local jurisdictions, we provide emergency planning services for state governments such as Kansas, Pennsylvania, South Dakota, Vermont, and Wyoming, as well as the entire Judicial Branch of the State of California. Of particular note we are assisting the North Carolina County of Dare with Emergency Operations Planning; and the counties of Caldwell, Lincoln, Mitchell and Stanly; as well as the Eastern Band of Cherokee Indians, with Continuity of Operations Planning.

Login to demo.BOLDplanning.com

Username or Email Address

Password (Case-Sensitive)

4 X 9 5 3
5

Enter security code listed above :

Login Clear

Forgot Username/Password?

BOLDplanning
Your Partner in Preparedness

Welcome to the BOLDplanning.com System!

The Premiere Web-based Planning Solution

Development

BOLDplanning
Your Partner in Preparedness

What's Your Plan?

BOLDplanning, Inc. is a leading provider of web-based emergency planning tools and services and is the solution of choice for more than 7,500 clients globally. Our company's extensive background in emergency planning combined with the powerfully equipped planning system is what allows us to streamline the planning process and deliver superior planning guidance and services.

- **Continuity of Operations Planning (COOP)** - Continuity Planning Module
- **Business Continuity Planning (BCP)** - Business Continuity Planning Module
- **Emergency Operations Planning (EOP)** - Emergency Operations Planning Module
- **Hazard Mitigation Planning (HMP)** - Multi-Hazard Mitigation Planning Module

Our web-based planning system and modules are specifically designed to address the key requirements, best-practices, and necessary planning elements of their respective industry sectors. Our system intuitively lead users through the process of each step in developing their plans and provides a guided pathway which ensures that all facets of their plan are highlighted, addressed, and compliant.

Our "BOLD" approach provides an unparalleled planning solution to our clients that makes the plan development process easy to understand and highly efficient to maintain.

For more information or to request a live demonstration / trial password, please contact us at info@BOLDplanning.com.

BOLDplanning.com Login Page Screenshot

In 2004, BOLDplanning realized that COOPs, EOPs and other planning elements were vital to the well-being of all organizations, but that the tools and methodologies available at that time were inadequate. There were no viable planning tools that could easily lead large, complex organizations through this long-term process. In response to that need, the BOLDplanning.com system was developed – a comprehensive web-based tool designed to take advantage of the internet. This flagship system has evolved into the leading brand that is changing the way organizations develop, update and maintain continuity and emergency plans.

The BOLDplanning.com system has been designed to address all required planning elements based on DHS/FEMA guidance and private sector best practices.

- Continuity of Operations Planning – BOLDplanning continually monitors all COOP/COG guidance published by the DHS/FEMA and then updates the system to comply. All COOP/COG plans developed in this framework follow the recent guidance of Continuity Guidance Circular 1 and 2, the National Incident Management System, and the National Response Framework.
- Continuity of Government Planning – BOLDplanning works with organizations across the country to coordinate their COOP plans into a consolidated COG plan for essential functions. BOLDplanning monitors all federal guidance and requirements that relate to COG, and combines this with our COOP development and client training.
- Emergency Operations Planning – BOLDplanning adheres to all guidance from the Comprehensive Preparedness Guides 101 and 201, and the National Incident Management System for emergency operations planning for local governments. This integrates the EOP elements with the COOP for enhanced response and recovery.



BOLDplanning manages many complex planning efforts across the country. These planning projects are centrally managed and extend across all business units within the organizations. The commonality in these projects includes:

1. The requirement to distribute the planning responsibilities to key stakeholders and staff while maintaining a standardized environment.
2. The requirement to scale the planning effort across large, complicated organizations in an efficient and effective manner.
3. The requirement to easily train staff regarding emergency planning issues, and continually test and exercise the plans with minimal impact on day-to-day operation.

BOLDplanning currently works within a number of different sectors with a specific focus on state and local government agencies. This select list of current clients offers examples of comprehensive planning projects for large, multi-faceted organizations with needs similar to yours.

Local Government Clients

- Caldwell County, North Carolina – All county departments
- Lincoln County, North Carolina – All county departments
- Dare County, North Carolina – All county departments and locations
- Mitchell County, North Carolina – All county departments
- Eastern Band of Cherokee Indians, North Carolina – All tribal departments and locations
- Stanly County, North Carolina – All county departments
- Hilton Head Island, South Carolina – All town departments
- Gwinnett County (Atlanta), Georgia – All county departments
- DeKalb County (Atlanta), Georgia – All county departments and locations
- Douglas County, Georgia – All county departments
- City of Chicago, Illinois – All city departments and locations
- Denver, Colorado UASI Region – 11 counties and 35 cities
- Maricopa County, Arizona – All county departments and cities
- Collier County, Florida – All county departments
- Portland/Salem, Oregon Region – 13 counties and 40+ cities
- Ramsey County, Minnesota – All county departments and 16 cities
- Williamson County, Texas – All county departments
- Monterey County, California – All county departments
- City of Palo Alto, California – All city departments
- Washoe County (Reno), Nevada Region – 6 counties and 15 cities and tribes

State Government Clients

- Commonwealth of Pennsylvania – All state agencies and departments
- State of California Judiciary – The Supreme Court and all Appellate and Superior Courts
- State of Kansas – All state departments and all counties
- State of New York – The NY State Insurance Fund
- State of Oregon – 23 state agencies and all counties and cities
- State of South Dakota – All state departments and agencies
- State of Vermont – All state departments and agencies
- State of Washington – Department of Labor and Industries

The BOLDplanning.com System

The founders of BOLDplanning began developing cutting-edge cloud-based planning tools in 2004. They designed a system that would develop alongside the exponential growth of information and digital technology usage and reliance in the workplace. This concept quickly caught on with emergency managers and first responders because it increased their ability for collaboration, standardization and compliance. Today, thousands of organizations have discarded their old templates and spreadsheets to join our growing nationwide community of BOLD planners.

Our system is the anchor for our planning projects. We have listened to our community of emergency and continuity planners and built tools that are simple, flexible and powerful. In order to help our clients plan more efficiently and effectively, we focus on the following key strengths:

- Keeping our system easy to use for planners of all levels
- Maintaining the entire technical infrastructure; including hosting, updates, disaster recovery, and data backups
- Customizing the plan elements to match the specific requirements of each organization
- Providing best practice guidance embedded in the system for ongoing compliance with current regulations and standards

Deployment and Hosting

Our web-based planning system is the centralized data collection tool that makes plan standardization, plan review and plan monitoring possible. The BOLDplanning.com system is deployed under the Application Service Provider (ASP) model – more commonly known as Software-as-a-Service (SaaS) or the Cloud.

Our team manages every technical aspect related to the system for the life of the project including hosting, backups, system redundancy, disaster recovery planning, system maintenance and technical support. Access to the internet is the only requirement for using this system. The following details the technical specifications for this standard hosted service:

- Utilizes standard Microsoft Operating systems and SQL Server
- Compatible with Microsoft Word and Excel
- Supports SSL browser encryption, complex passwords and AES-256 data encryption at-rest for data security
- Hosted in a secure professional data center on dedicated servers
- Data backup conducted nightly to ensure data redundancy
- Monitored to ensure continuous 24/7 system operation

System Branding and Customization

One of the keys to our ongoing success is the customization and branding of our standard BOLDplanning.com system. Our commercial off-the-shelf (COTS) software package is available for immediate deployment and use by staff. However, for each project, we customize this standard system to ensure the development of comprehensive plans that meet the client's specific requirements. BOLDplanning has performed this customization process hundreds of times for government and private sector clients.



Examples of Branded Systems

An independent version of BOLDplanning.com will be deployed uniquely for the county's planning and preparedness requirements. The following branding items are included:

1. Web Address – The new system will be deployed at a web address chosen by the county.
2. Logo and Color – The new system will remove the BOLDplanning logos and standard colors, and replace these branding elements with the official logo and color scheme for your organization.
3. Home Page and Plan Template Text – The new system will replace the existing home page and plan template text with specific text provided by your organization.
4. Helper Tips – All existing Helper Tips can be replaced with specific instructions for your planners.
5. Pre-Loaded Data – Existing information can be imported and loaded into the system in advance of rollout to departments. This makes the planning more efficient and integrated.

Continuity of Operations Planning Module

The COOP Module within BOLDplanning.com is an easy-to-use planning tool that walks users through each step of developing a Continuity of Operations Plan. By following the system's Main Menu, organizations are assured of compliance with CGC 1 & 2 and other FEMA guidance. Data elements are addressed and then detailed plans and reports are generated for preparedness and response.

Status	Report	WORD Summary
	Main Plan	
	Annex A - Teams and Responsibilities	
	Annex B - Facilities	
	Annex C - Mission Essential Functions	
	Annex D - Orders of Succession	
	Annex E - Delegations of Authority	
	Annex F - Alert Notification Procedures	
	Annex G - Vital Records / Resources	
	Annex H - Drive Away Kits	
	Annex I - Communications	
	Annex J - Security Access Control	
	Annex K - Family Disaster Plan	
	Annex L - Devolution	
	Annex M - Test, Training, and Exercise	
	Annex N - Facility Evacuation	
	Annex O - Contacts	
	Annex P - Pandemic Planning	
	Annex Q - Risk Assessment	

COOP Module Main Menu and Reports Page

The primary focus of this plan is to ensure that an organization has addressed and identified the issues of relocation and protected its ability to continue to perform essential functions. Using the COOP module, organizations can be assured that their plan is developed and maintained within a system built upon COOP and government best practices planning standards.

Data Entry for Planning Elements

BOLDplanning has developed a complete set of data entry screens for each element of a COOP. These screens are constantly modified and updated based on the feedback from the collective user group of emergency managers and planners.

The screenshot displays the BOLDplanning web interface. At the top left is the BOLDplanning logo with the tagline "Your Partner in Preparedness". To its right, the page is titled "Essential Functions" and "Finance Department". A user welcome message in the top right corner reads: "Welcome, Peter Hodes. Your username is peterhodes. Your access level is Site Administrator. My Account - User Manager Instance: i-557c4f31". A navigation bar below the header contains links: "Main Menu", "General Info", "Contacts", "Manage Your Plan", "File Archive", "Reports", "Email Notification", "Administration", and "Logout". The main content area is titled "Essential Functions" and prompts the user to "Please Enter the Mission Essential Function". A large text area contains the example text "Manage cash flow and banking functions." To the right of this area is a vertical stack of buttons: "Function", "Link People", "Link Vital Records", "Link Facilities", "Link Hazards / Risks", and "Enhanced BIA". Below the main text area, there are several dropdown menus: "Tier" (set to "Tier 1 - Functions to be performed, given a One Day disruption. (Highest priority to lowest)"), "Organizational Unit (Division)" (set to "Finance Department"), "Is this a PMEF?" (set to "No"), and "Function Type (Extra Field)" (set to "Select"). A blue callout box highlights the "Please Identify The Impact Of Failure To Perform The Function Including Financial, Reputation, Data, Operations, Market Share, Goodwill, Customer Service, etc." section, which includes a text area, a "Recovery Procedures and Gap Analysis" section with another text area, and a "Custom Field 2 (Extra Field)" section with a third text area. Each text area has a rich text editor toolbar above it.

Sample Data Entry Screen for Essential Functions

For each data entry screen, users have the following capabilities:

- Add, modify and delete planning data
- Simultaneous access for multiple planners from diverse geographic locations
- Save data to make it immediately accessible to other planners
- Helper Tips on each page for commonly asked questions
- Drag-and-drop, spell check and other incorporated technologies

Plan Collation and Administration

The real power of the system is the ability to develop a large number of departmental plans in a standardized environment and then manage these individual elements as a combined organizational group. Project managers and system administrators have the following capabilities for managing and accessing the data from the various departments and agencies within their overarching structure:

- Administrator access to all planning elements for each departmental plan
- Review, score and provide comments electronically for each plan element
- View individual and group status via the Red/Yellow/Green status lights
- Produce roll-up reports that collate data from all plans
- Monitor system usage and ongoing maintenance with the audit logs
- Receive feedback from planners through the on-line survey tool

BOLDplanning
Your Partner in Preparedness

Plan Grades / Report Card
Finance Department - (COOP) - (105)

Welcome, Jan Dudek.
Your username is jan.
Your access level is Site Administrator
My Account - User Manager
Instance: i-557c4f31

Main Menu | General Info | Contacts | Manage Your Plan » | File Archive | Reports | Email Notification | Administration | Logout

Plan Grades / Report Card

Plan Type: COOP PDF Generate Report

Plan	Status
Jefferson County Community and Family Health Services - COOP	Not Yet Graded
Jefferson County EMS and Medical Transport Services - COOP	13%
Jefferson County Finance Department - COOP	87%
Jefferson County Human Resources Department - COOP	74%
Main Plan	
Annex A - Teams and Responsibilities	
Annex B - Facilities	
Annex C - Mission Essential Functions	
Annex D - Orders of Succession	
Annex E - Delegations of Authority	
Annex F - Alert Notifications	
Annex G - Vital Records / Resources	
Annex I - Communications	
Annex J - Security Access Control	
Annex K - Family Disaster Plan	
Annex L - Devolution	
Annex M - Test, Training, and Exercise	
Annex N - Facility Evacuation	
Annex O - Contacts Roster	
Annex P - Pandemic Planning	
Annex Q - Risk Assessment	
Annex R - Risk Specific Action List	
Jefferson County Immunization and School District Liaison Offices - COOP	Not Yet Graded
Jefferson County Information Technology Department - COOP	71%
Jefferson County Laboratory - COOP	Not Yet Graded

Entry Screen for Plan Grades Report Card

Implementation Strategy

Preparing for emergencies cannot be fully outsourced. In order to do it right, you must engage, think, talk, and practice. We have worked with large and small organizations across the country in many diverse industry sectors. Using this experience, we have developed and refined a complete planning methodology to assist organizations with every step of this long-term process.

BOLDplanning will provide your organization with necessary materials to implement a multimedia approach for strong organizational planning. The cloud-based planning tools are the centerpiece of the methodology with the capability of data collection and report generation; however, there are many other elements used for successful project management:

- Schedules, phases and project plans
- Solicitation of support from executive management
- On-site training and team meeting facilitation
- On-line and printed documentation for all phases of the project
- Subject matter expertise and technical assistance
- Plan reviews and gap analysis
- Testing and exercising
- Plan finalization and approval by executive management
- Ongoing maintenance and enhancement
- Institution of a long-term commitment to emergency preparedness

There are no easy answers or short cuts for true emergency preparedness. In today's increasingly unstable world, it is worth the time, money and effort to be sufficiently ready for a number of scenarios. Each step is not hard and does not take long, but to build a "culture of preparedness" in your organization, effort must be made. Our proven, detailed methodology has been field-tested over and over, and is flexible for working with organizations at all stages and levels of planning. We assist you with our lessons learned and our best practices so you can immediately begin planning without re-inventing the wheel.

BOLDplanning has developed the following project plan for the City and County of Durham. As necessary, BOLDplanning can modify this project plan to include additional services to assist with ongoing plan development, testing and maintenance. Optional services are included in this proposal for your consideration. This work plan provides a standard framework for our local government implementations; however, we will work with your project managers to ensure that the finalized contracted project plan provides all the services deemed necessary by your jurisdiction.

Our standard fixed-price model with a breakdown by phase is included and guarantees no cost over-runs. BOLDplanning supplies the following project details with phases, deliverables and estimated schedule.

Phase 1: System Licensing, Branding and Customization – Days 1 through 30

BOLDplanning will deploy a customized version of BOLDplanning.com. This phase includes the following deliverables:

1. One (1) year Enterprise Subscription Licensing for the BOLDplanning.com COOP Module.
2. Hosting, maintenance, upgrades, hot-site redundancy, and data backups for the Software-as-a-Service/Cloud implementation.
3. Technical services related to system branding and start-up configuration.
4. Project management services and administration for the successful completion of all deliverables.

Phase 2: Project Initiation and Preparation – Day 31 through 60

After the completion of the system setup, BOLDplanning will schedule and facilitate a COOP Initiation Meeting via webinar/conference call with your project management team. During this meeting, the standard BOLDplanning.com functionality will be reviewed and compared against all applicable compliance requirements. All appropriate stakeholders and staff will be encouraged to attend this COOP Initiation Meeting. This meeting will focus on the following agenda items:

- Introductory training to BOLDplanning.com for Project Managers and system administrators.
- Analysis of existing plans, data, templates, checklists, and best practices to determine options for transferring data into the system.
- Review of strategy and documentation for system rollout to all participating planners.

From the results of the COOP Initiation Meeting, BOLDplanning will begin the technical configuration and the transfer of applicable data. The following deliverables will be part of this phase:

1. Completion of system configuration items and terminology changes discussed during the COOP Initiation Meeting.
2. Transfer of vital applications, facilities, key staff and applicable data from any existing plans, database systems and other documents into appropriate sections of the system.
3. Project management for the review and approval of the final system and the transferred data.
4. Development of the planning structure and creation of departmental plans.
5. Identification of appropriate planners for each of the participating departments.
6. Delivery of the Project Managers Package with project description materials, user documentation, and rollout instructions and suggestions.
7. Ongoing help desk support for all project managers and appropriate team members.

At the completion of this phase, BOLDplanning will give access to the customized system to the project managers.

Phase 3: Kickoff and Plan Development Workshops – Day 61 through 90

BOLDplanning will schedule and conduct a series of two (2) consecutive full-day COOP Plan Development Workshops for the participating planners. Each day is a stand-alone, hands-on workshop, allowing planners to choose and attend only a single session. At the conclusion of these workshops, planners will have draft plans under development and clear instructions for future data collection efforts. An organized rollout will be initiated for all the participating departments and divisions. The following deliverables will be part of this phase:

1. Distribution of access credentials to each of the participating planners.
2. Introduction to continuity planning and to the BOLDplanning.com system.
3. Review of all existing data transferred into the system.
4. Significant time for actual plan development as planners enter data into the web-based tool.
5. Instructions for additional data input, planning team meetings and an estimated schedule for plan completion.
6. Completion of the two consecutive on-site COOP Plan Development Workshops.

Phase 4: Mid-Term Workshops – Day 91 through 120

BOLDplanning will schedule and conduct two (2) consecutive full days of Mid-Term Workshops. All key stakeholders and planners will be invited to attend and work to finalize the planning elements for their respective business units. At the conclusion of these workshops, planners will have completed COOP elements and clear action items for plan finalization.

A detailed and documented training process that includes training plans, agendas, documentation and flexible workshop formats has been developed for BOLDplanning.com. As necessary, each day of training will be conducted in one of the following formats:

- Full-day workshop
- Two (2) half-day workshops
- Consecutive 60- or 90- minute workshops
- Individual or group workshop formats

Each session is a stand-alone, hands-on workshop, allowing planners to choose and attend a single session. Specific deliverables for each workshop may include the following:

1. Introduction to COOP and to the BOLDplanning.com system.
2. Time for actual COOP development as planners review current data and enter additional departmental data into the planning system.
3. Instructions for additional data input, planning team meetings and an estimated schedule for plan completion.
4. Details about the monthly Plan Maintenance Cycle (PMC) for COOP enhancement.

These workshops will focus strongly on collecting the following data elements:

- Essential Functions and interdependencies to staff and vital records
- Succession planning and delegation of authority
- Vital records, databases and systems
- Alternate facility options with resource requirements
- Procedures and policies for COOP activation, deployment and implementation

Phase 5: Plan Reviews – *Day 121 through 150*

BOLDplanning will complete plan reviews of all plans. Each section of the departmental plans will be reviewed by a subject matter expert. Using the on-line review tool within the system, the plans will be analyzed and each section will receive a **Red/Yellow/Green** status level along with comments for improvement. The review levels and comments will be immediately available for planners via the web-based tool, and will provide the project managers with a detailed status report for all plans under development. The following deliverables will be part of this phase:

1. Review of existing data for all planning elements.
2. Delivery of a **Red/Yellow/Green** status level for each COOP element.
3. Gap analysis and comments for plan improvement.
4. Instructions for additional data input as required for plan completion.

Phase 6: Plan Finalization Workshops – *Day 151 through 180*

BOLDplanning will schedule and conduct two (2) consecutive days of Plan Finalization Workshops. Each session is a stand-alone, hands-on workshop, allowing planners to choose and attend only a single session. All key stakeholders and planners will be invited to attend and work to finalize the planning elements for their respective departmental COOP plans. At the conclusion of these workshops, planners will have completed all COOP elements and have clear action items for plan finalization. The following deliverables will be part of this phase:

1. Delivery of gap analysis documentation for each department plan.
2. Delivery of specific instructions for plan completion.
3. Consulting services to complete all plan update requirements.
4. Significant time for actual COOP plan updates as reflected in the gap analysis documentation.

Phase 7: Plan Verification and Completion – Day 181 through 210

BOLDplanning will complete re-reviews of all updated plan elements. Using the on-line review tool within the system, the plans will be analyzed and updated sections will receive a **Red/Yellow/Green** status level along with comments for improvement. Upon completion of the verification of the departmental plans, BOLDplanning will complete and deliver a copy of the Plan Review Report to the project manager. The following deliverables will be part of this phase:

1. Review of all updated COOP data per departmental plan.
2. Delivery of a **Red/Yellow/Green** status level for each COOP element for each departmental plan in the system.
3. Gap analysis and comments for plan completion.
4. Completion and delivery of Plan Review Report.
5. Completion and delivery of a Continuity of Government plan in collated format.

Phase 8: Plan Maintenance – Day 211 through end of subscription

BOLDplanning will maintain the system for the remainder of the initial one (1) year subscription period. During this project period, the departments and their planners will continue to receive the following services:

1. SaaS/Cloud infrastructure with all hosting, maintenance, upgrades, hot-site redundancy, and data backups.
2. Real-time plan access through the internet.
3. Telephone and internet technical support and customer service.
4. Project manager training via telephone and webinar.

All planners will receive the following resources to assist with plan development and maintenance for their departments:

- BOLDplanning.com – This is an excellent training resource by itself. This system details every element of a COOP, asking for specific data for each plan element. The plan reports provide a wealth of information that assists planners, managers and staff with making good decisions during times of disruption.
- On-line Helper Tips – Embedded throughout the system, there are detailed helper tips that explain COOP concepts and provide instructions for data entry.
- Help Files Library – In the File Archive section of each plan there is a Continuity Plan User Guide as well as a library of training webinars covering all the major elements of the plan for planners to use at their convenience.
- Webinar Training – BOLDplanning offers free webinar trainings on the first Wednesday of each month, one for planners and another session for project managers.

Optional Planning Services

BOLDplanning has proposed a package of services with the associated deliverables and fixed-cost pricing as detailed above. As necessary, planners may require additional services to develop, maintain and enhance planning elements. The following service menu provides a list of available services.

On-Site Training Workshop

BOLDplanning will work directly with project managers to schedule and conduct on-site training or plan development workshops for planners for all participating departments. A detailed and documented training process that includes training plans, agendas, documentation, and flexible workshop formats has been developed. As necessary, each day of training will be conducted in one of the following formats:

- Full-day COOP workshop
- Two (2) half-day COOP workshops
- Consecutive 60- or 90-minute workshops
- Individual or group workshop formats

Each session is typically a stand-alone, hands-on workshop, allowing planners to choose and attend a single session. Specific deliverables for each workshop may include the following:

1. Introduction to continuity planning and to the BOLDplanning.com system.
2. Significant time for actual COOP development as planners review current data and enter additional departmental data into the planning system.
3. Instructions for additional data input and planning team meetings.
4. Details about the monthly Plan Maintenance Cycle (PMC) for COOP enhancement.

Software Subscription Licensing Annual Renewal

This project includes the initial one (1) year subscription licensing for BOLDplanning.com COOP Module. At the end of the initial one (1) year subscription period, the project managers have the option to renew this annual subscription license for the county. If this project is terminated at the end of this initial period, each planner will be able to download current plans in MS Word and Excel formats. This annual renewal includes the following deliverables:

1. Hosting, maintenance, redundancy, data backups and system upgrades.
2. Continued access to the system for plan development and maintenance for all departments, divisions and business units.
3. Real-time plan access through the internet for all planners and emergency responders.
4. Telephone and internet technical support and customer service.

Pricing

Total Project Cost	\$ 78,500
Phase 1: System Licensing, Branding and Customization	\$ 17,000
Phase 2: Project Initiation and Preparation	\$ 10,600
Phase 3: Kickoff and Plan Development Workshops	\$ 10,300
Phase 4: Mid-Term Workshops	\$ 10,300
Phase 5: Plan Reviews	\$ 10,500
Phase 6: Plan Finalization Workshops	\$ 10,300
Phase 7: Plan Verification and Completion	\$ 9,500
Phase 8: Plan Maintenance	Included
OPTIONAL Services	
On-Site Training Workshop (2 consecutive day minimum)	\$ 4,000 per day
System Software Subscription Annual Renewal	\$ 15,400 per year

Payment Terms

BOLDplanning provides the following details regarding delivery and payments.

Phase 1: System Licensing, Branding and Customization

The specific deliverable for this payment is delivery of the customized system to the project manager/s.

Phase 2: Project Initiation and Preparation

The specific deliverable for this payment is the completion of the COOP Initiation Meeting.

Phase 3: Kickoff and Plan Development Workshops

The specific deliverable for this payment is the completion of two (2) consecutive days of on-site training workshops.

Phase 4: Mid-term Workshops

The specific deliverable for this payment is the completion of two (2) consecutive days of on-site training workshops.

Phase 5: Plan Reviews

The specific deliverable for this payment is the completion and delivery of the red/yellow/green reviews and section comments for all departmental plans.

Phase 6: Plan Finalization Workshops

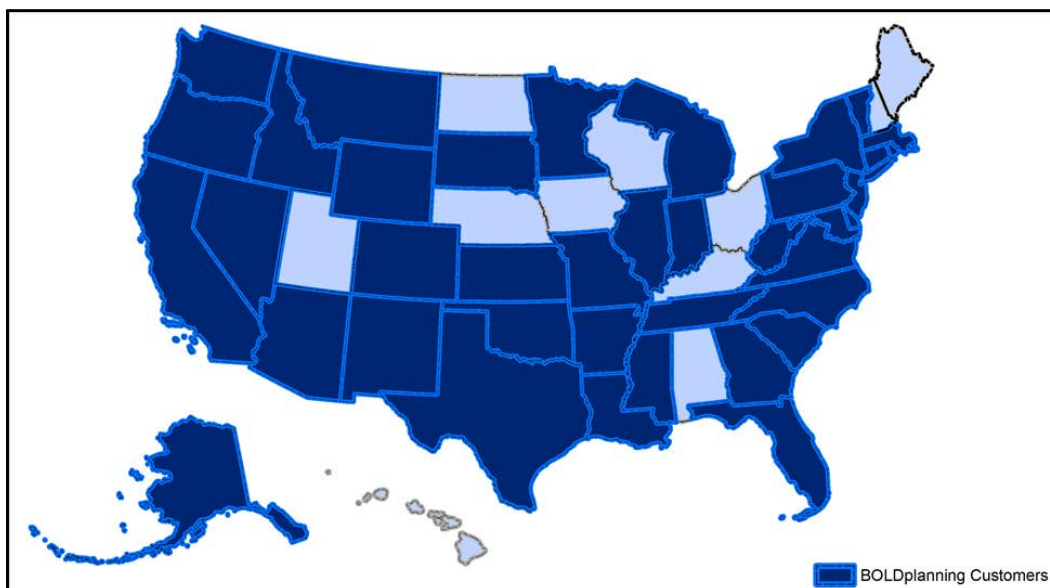
The specific deliverable for this payment is the completion of two (2) consecutive days of on-site training workshops.

Phase 7: Plan Verification and Completion

The specific deliverable for this payment is the completion and delivery of the red/yellow/green reviews and comments for all updated sections of departmental plans.

References

Our core business is providing assistance with emergency and continuity plans. We have an unprecedented list of organizations across the country using our consulting services and our BOLDplanning.com system for efficient and effective disaster plan development and maintenance. Each of these organizations has similar emergency management and preparedness goals and objectives. BOLDplanning provides the following select list of references.



BOLDplanning Customer Map – 2017

Local Government

DeKalb County (Atlanta) *Client since February 2015*

1950 West Exchange Place; Tucker, GA 30084

Contact Name: Chief Sue Loeffler

Contact Position: Emergency Management Director

Telephone: (678) 406-7768

Email: svloeffl@dekalbcountyga.gov

Services Provided: COOP/COG/EOP development and maintenance for all departments and locations.

Gwinnett County (Atlanta) *Client since March 2009*

770 Hi-Hope Road, P.O. Box 602; Lawrenceville, GA 30046

Contact Name: Greg Swanson

Contact Position: Office of Homeland Security Director

Telephone: (770) 513-5060

Email: gregory.swanson@gwinnettcountry.com

Services Provided: COOP/COG development, exercising and maintenance for all departments and locations.

City and County of Denver *Client since April 2006*

1437 Bannock, Room 3; Denver, CO 80202

Contact Name: Lin Bonesteel

Contact Position: Grant Coordinator for the Mayor's Office of Emergency Management

Telephone: (720) 865-7659

Email: Linda.bonesteel@denvergov.org

Services Provided: COOP/COG/EOP development, exercising and maintenance for all city departments.

Town of Hilton Head Island *Client since April 2013*

40 Summit Drive; Hilton Head Island, SC

Contact Name: Tom Dunn

Contact Position: Emergency Management Coordinator

Telephone: (843) 247-3744

Email: thomasd@hiltonheadislandsc.gov

Services Provided: COOP/COG development and maintenance for all town departments.

Ramsey County *Client since June 2014*

121 7th Place East, Suite 2300; St. Paul, MN 55101

Contact Name: Judson Freed

Contact Position: Director of Emergency Management and Homeland Security

Telephone: (651) 266-1014

E-mail: judd.freed@co.ramsey.mn.us

Services Provided: COOP/COG/EOP development, exercising and maintenance for all county departments and locations.

City of Colorado Springs *Client since January 2010*

375 Printers Parkway, Mail Code 1442; Colorado Springs, CO 80910

Contact Name: Tobi Blanchard

Contact Position: Emergency Management Coordinator

Telephone: (719) 385-7228

Email: tblanchard@springsgov.com

Services Provided: COOP/COG development, exercising and maintenance for all city departments.

Collier County Emergency Management Department *Client since August 2010*

8075 Lely Cultural Parkway, Suite 445; Naples, FL 34113

Contact Name: Rick Zyvoloski

Contact Position: Emergency Management Coordinator

Telephone: (239) 252-3606

Email: RichardZyvoloski@CollierGov.net

Services Provided: COOP/COG development and maintenance for all departments.

State Government

Commonwealth of Pennsylvania *Client since January 2012*

555 Walnut Street; Harrisburg, PA 17101

Contact Name: Brandi Gamble

Contact Position: Continuity of Government Director

Telephone: (717) 705-5590

Email: bgamble@pa.gov

Services Provided: COOP/COG development and maintenance for all state departments.

New York State Insurance Fund (NYSIF) *Client since October 2010*

199 Church Street; New York, NY 10007

Contact Name: Denise Miller

Contact Position: Director of Training

Telephone: (518) 437-1876

Email: dmiller@nysif.com

Services Provided: BCP development, exercising and maintenance for all locations.

Oklahoma Tax Commission *Client since October 2014*

2501 North Lincoln Boulevard; Oklahoma City, OK 73194

Contact Name: Lori Pierce

Contact Position: Manager, Business Continuity & Disaster Recovery

Telephone: (405) 522-0308

Email: Lori.Pierce@tax.ok.gov

Services Provided: BCP development, exercising and maintenance for all departments and divisions.