



Post Emergency Exercise Review (PEER) Checklist

The Post Emergency Exercise Review, or PEER, checklist is designed to guide discussion amongst all affected parties to evaluate key components of contingency plans and response and recovery efforts.

PEER Discussion Categories:

1. Preplanning

- Were their existing business continuity plans for the businesses?
- Were business continuity strategies implemented, or in the process of being implemented, for the business?
- Were recovery time objectives established?
- Where alternative-processing locations identified beforehand? Were emergency operation centres identified beforehand?
- Were roles and responsibilities defined ahead of time for employees and responders?
- How effective was the use of preplanned procedures or strategies in the response and recovery process?
- Were documented plans, procedures or call lists up-to-date?
- Were vital records backed-up and stored offsite for recovery purposes?
- What training and awareness activities occurred prior to the event? Did people feel they were prepared as a result of proper training?

2. Initial Response

- Were first responders, internal and external, notified of the event in a timely manner? What worked well and what may have worked better?
- Were employees notified and kept informed of the event in a timely manner?
- Did personnel know where to go after evacuating the work site? Were there designated assembly points?
- What steps were taken, if any, to ensure staff were prepared at work and at home?
- If appropriate, were people sent home in a timely fashion?
- What was the method to account for evacuated or displaced employees? How successful was this method?
- Were there communications with local emergency agencies or other outside response or support groups?

3. Emergency Notifications

- Were there clearly defined roles and responsibilities?
- Who needed to be called at the onset of the event?
- How did recovery team personnel stay in touch throughout the event?
- How were employees kept up-to-date? Phone calls to home, e-mails, media or press announcements, etc.?
- How were customers notified and kept up-to-date?
- What assistance did HR provide?
- How was the IT Help Desk notified?
- Did the Help Desk respond to the event with notification of additional resources? Were there any open issues?
- Was a hotline number used for message status to employees? Were any problems encountered?

4. Recovery Management

- Did a 'Silver' incident management team manage the event?
- Did the business have a 'Bronze' local incident management team in place and activated? Was there coordination with the 'Silver' incident management team?
- Were team member roles and responsibilities understood (e.g. were there issues of who was doing what or people performing the same tasks)?
- Was the structure of the 'Bronze' incident management team or any other incident management team useful?
- Where problems and issues moved to the appropriate person, team or management?
- Were issues resolved in a timely manner?
- How can the entire process be improved?

5. Employee Assistance

- How were the needs of employees determined? How did employees communicate requests for assistance? Was there a need to prioritize the demands?
- Was the response sufficient? How could it be improved? What preparatory work, if any, can be done to supply staff with essentials in the event of another serious event?
- Are there employee assistance issues that remain or that have not been addressed properly?
- How were personal issues that inhibited the business recovery needs addressed?

6. Business Impact and Recovery

- Was it clear what business functions had to be recovered at the onset? If not, who made the decision?
- Did business managers assess the overall impact the event had to their business? What were some of the key issues? What are the short and long term results to the business?
- What is the state of the business today? Are the operations back to 100%?
- Does the business continuity plan need revising due to the lessons of the business recovery?
- Were pre-defined recovery time objectives met?

7. Facility Restoration

- Was the business able to communicate their priorities for restoration of files, equipment and other resources?
- Were outside vendors specializing in restoration used in the process?
- Was information from relevant utility companies, such as water and power, forthcoming regarding the restoration of services to the site?
- Was the impacted facility restored to normal?
- Was restoration timely? To the business' satisfaction?
- How effective was the process of moving the business back to their home facility?
- What is the status today of the affected site? Are there any issues that have not received the needed attention?

8. Customers

- What assistance was provided to our customers? Financial and personal?
- Was there adequate communication to our customers?
- Were there any special requests from our customers outside of the norm?
- Did we gain or lose customers?
- How was the customer response to our recovery efforts?
- What were some of the customer comments received?
- Were our restoration efforts within customer expectations?
- How did our competitors perform, whether impacted or not?

9. Communications

- Was there enough communications in place and used?
- With no phone service, what forms of communication were used?
- Did communications flow between employees and management?
- Was communications a stumbling block in either the response or recovery efforts?
- What worked well and what did not as well? Do we need to be better prepared as a result of the experience learned?

10. Corporate Wide Assistance

- What assistance could have been provided that wasn't?
- What are some suggestions to help Corporate improve in its response?

11. Open Issues and Action Items

- Is the present recovery strategy still viable given the results of the recovery efforts to this incident?
- Are there activities that were used or roles that were assumed that need to be documented in the plan?
- Is additional or updated training required for staff?
- Are there activities that were used or roles that were assumed that need to be documented in the plan?