

Client Information Workbook

Please complete the highlighted fields. Once all fields have been completed save the file to your desktop by selecting File and Save As from the menu bar and then in the drop-down list select Desktop. Name the file as your entity/company name followed by "Plan".



**1-888-KLEANUP
(553-2687)**

Return to Amanda at acurry@specialtyrestoration.net





Specialty Restoration

Priority Plus Plan

Proactive:

➤ **Emergency Management Information System**

- ✓ Preparation and planning to react quickly in an emergency
- ✓ Complete Detailed Survey to ensure familiarity with your facilities

➤ **Business Continuity Planning**

- ✓ Having the guidelines in place to keep your facilities operable
- ✓ Minimizing interruptions by having alternate plans established

➤ **Review of your Insurance Policy**

- ✓ We will review the policy limits, replacement cost coverage and deductible with key personnel.

Reactive:

➤ **Fast, Real Time Response**

- ✓ Response from SRT Emergency Coordinator within 15 minutes
- ✓ Upon damage assessment, mobilization within 1 hour



Facility Information

1. Facility Name: _____

2. Physical Address: _____

City, State: _____

3. Mailing Address: _____

City, State: _____

4. Facility Type: _____

(Hotel, School, Church, etc.)

5. Number of buildings covered under the plan: _____

6. Is the Facility used as a shelter in an Emergency: Yes or No

Key Personnel

Please list in order to be contacted

1. Name: _____

Position: _____

Phone #1: _____

Phone #2: _____

Email: _____

3. Name: _____

Position: _____

Phone #1: _____

Phone #2: _____

Email: _____

2. Name: _____

Position: _____

Phone #1: _____

Phone #2: _____

Email: _____

4. Name: _____

Position: _____

Phone #1: _____

Phone #2: _____

Email: _____



Internal Emergency Response Team (IER)

Title	Name	Phone Number	Responsibilities
Emergency Team Leader	Example Superintendent		Activates the Disaster Plan; coordinates all recovery activities; supervises all members of the IER.
Work Crew Coordinator			Coordinates the emergency work force of staff and volunteers until Specialty Restoration arrives on site.
Technology Coordinator			Assesses damage to all technology systems including computers, servers, and telecommunication systems.
Library Collections			Assesses damage to Library and all items within. Supervises the immediate preservation of Library contents.
Building Recovery Coordinator			Assesses damage to the building structure and systems. Logs information to give to Specialty Restoration.
Security Coordinator			Maintains security of building(s) and property during initial emergency. Delegates security positions.
Public Relations			Coordinates all public relations including communication with the media and the public.
Financial Coordinator			Responsible for all emergency financial transactions including purchasing materials and supplies.



Insurance Information

Insurance Carrier : _____

Policy Number: _____

Deductible: _____

Contact Person: _____ Phone Number: _____

(Agent)

Business Interruption Insurance: Yes or No

Notes: _____



Power Supply Information

Mandatory Power Needs: Yes or No Location: _____

Example: Cafeteria Freezer

Current Power Back-Up Plan: Yes or No Explain: _____

Power Back-Up Fuel Plan: Yes or No Explain: _____

Special Electrical Needs: Yes or No Explain: _____

Climate Control Needs: Yes or No Explain: _____

HVAC Needs: Yes or No Explain: _____

Computer Data Areas: Yes or No Locations: _____

List any special needs not mentioned above: _____



DATA Information

Building Floor Plan: Yes or No Location: _____

Security Access Codes: Yes or No Location: _____

Alarm Company Name: _____ Phone Number: _____

Phone System: Yes or No Location: _____

Electronic Data: Yes or No Locations: _____

Priority Data: Yes or No Locations: _____

Notes: _____



Salvage Priorities

Setting priorities for salvaging contents is one of the most difficult but also one of the most important aspects of disaster planning. If an emergency occurs, there may be very little time to save your contents. You will not want to waste valuable time deciding (or arguing about) what to save! A listing of priority contents will allow your institution to concentrate on the most important materials that are accessible for salvage.

Priority Ranking	Material or Equipment	Specific Location
Highest Priority #1	Example: Data Processing/computers	Equipment Room
# 2		
# 3		
# 4		
# 5		
# 6		
# 7		
# 8		
# 9		



Command Center

During a disaster, a command center will be needed to serve as a base of operations for the Disaster Response Team. It is essential to have one central location through which all recovery activities are coordinated. All communications and decisions should be made through the command center.

List several locations that might be used as a command center in case of a disaster. The center should be near enough to the affected area to allow for easy communications, but far enough away to be safe and out of the way of the active salvage efforts. It should have easy access to phones and sufficient space to allow for completion of documentation and other paperwork.

Command Center location:(on-site) _____

Alternate location #1:(on-site) _____

Alternate location #1:(off-site) _____

City, State: _____



Current Contractors and Service Providers

Listing of all preferred companies or companies with existing contracts. If no preference, leave blank.

Electrician

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Plumber

Name: _____

Contact: _____

Address: _____

Phone#: _____

Email: _____

Locksmith

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Computer Tech /I.T.

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Gas Company

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Water Company

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Electric Company

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____

Telephone Company

Name: _____

Contact: _____

Address: _____

Phone #: _____

Email: _____



Contractors and Service Providers (cont.)

Oil/ Fuel Service

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Architect

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Cooling Service

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Heating Service

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Security System

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Sprinkler System

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Catering Service

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____

Elevator Company

Name: _____
Contact: _____
Address: _____
Phone #: _____
Email: _____



Temporary Storage of Contents

Designate one or more areas (within the building, in another building within the institution, or off-site) to which contents in imminent danger of becoming damaged could be relocated, or where undamaged contents could be temporarily stored while the building and damaged contents are salvaged. These areas should be secure and climate-controlled.

Within the building/facility

Location: _____

Space available: _____

Contact person: _____

Phone: _____

Cell phone: _____

Off-site

Location: _____

Space available: _____

Contact person: _____

Phone: _____

Cell phone: _____