DRI CANADA

Former. Planifier. Recouvrer.

Train.

Prepare.

Recover.

CBCP Application Guide

A step-by-step guide to completing your online application for the CBCP credential.

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How Does This Work?

Thank you for your interest in advancing your certification as a Business Continuity Professional. DRI Canada is an affiliate of DRI International, which offers certification that sets a global standard in knowledge and experience in your profession.

DRI Canada bases certification on the 2023 Professional Practices for Business Continuity Management, a guideline that describes the main subject areas of business continuity planning and disaster recovery. This guideline will help you complete your application. We suggest you familiarize yourself with it and the requirements of the various certification levels before you begin the application.

A not-for-profit organization, DRI Canada is led by volunteers who deliver DRI International's training and certification programs in Canada.

When a Canadian applies for certification, their application will be reviewed by two certified professionals who serve on the DRI Canada Certification Commission.

Each member of the Certification Commission has been elected to the Commission by their peers. You can be confident that when your certification application is being reviewed, the decision is being made by experienced and certified professionals with a deep understanding of the DRI International Professional Practices.

To certify an application, DRI Canada:

1 Ensures that a newly received application is complete.

2 References are asked to verify information contained in the application.

3 Two members of the Certification Commission review the application and reference feedback.

4 Reviewers can request clarification or more information (a reviewer may only ask for additional information once)

5 Makes a decision to award an advance certification or deny the application and informs applicant of the decision.

The Certification Commissioners will carefully consider the evidence supplied by the candidate and allocate an appropriate certification grade based on evidence supplied within the application and supporting documentation. The Commissioners are not permitted to research an individual.

Privacy and Personal Information

DRI Canada complies with Provincial and Federal legislation as it relates to the handling of personal and sensitive information. Every effort is taken to protect and secure information supplied to DRI Canada by individuals or by organisations whilst carrying out our normal duties. If you have any queries or concerns regarding the processing of data by the organisation please see the Privacy Policy on the DRIC website or contact our nominated Privacy Officer.

How to Use This Guide

Icons

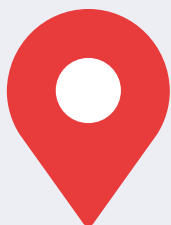These icons will be used throughout the Application Guide as visual cues.

PP
Professional Practice

CORE
CORE Professional Practice

Application Tips

Case Study Example

Case Study Commentary

It's important to express your professional experience in your own words. Please use this document only as a guide to the length, detail and style recommended for a successful application.

To demonstrate both how to complete the Professional Practice Subject Area elements of the application form, and to show an example of each element, we will follow the application of Robyn Green. This is a fictional but representative case study.

Introducing Robyn Green

Robyn Greene joined the Ministry of Public Services as a Policy Analyst in 2004. In 2006, she was asked to be their Lead for implementing a Continuity Management program. Robyn took the DRI Canada BCLE 2000 course, and after passing the qualifying exam, she was recognized as an Associate Business Continuity Professional (ABCP). She spent 18 months working to develop the Ministry's Business Continuity Management (BCM) Program, and then was assigned back to her job. Because of her experience and training, she was appointed her Division's BCM Lead, which amounted to about 20 per cent of her work duties. Two years later, Robyn applied for the BCM Coordinator job in the Ministry, and was the successful applicant. Since 2009, she has worked full time in Continuity Management. Robyn also sits on the Board of a local social planning agency, and leads the development of their BCM plan.

Application Overview

When you begin your CBCP online application, it is important that you have read and understand the application overview.

STEP 1: You must have successfully completed the ABCP qualifying exam, paid the application fee and been granted the ABCP credential.

STEP 2: Complete the online application, ...including writing 750 words for each of five Professional Practices.

STEP 3: Once you have completed the full application, you will be prompted to pay the application fee before you can submit the form.

Once you initiate an online application, it will be saved in the system for three months (from the date you started the application). You will receive 2-3 reminders before it is removed.

If you have questions about the application or the application process, please contact DRI Canada office by writing to certification@dri.ca or calling 1-844-228-8135.

Application for Certification

☑ **Qualifying Exam:** Successful completion required.

☑ **Reviewed by Commissioner:** This means that in order to be granted your CBCP, your application will be reviewed and assessed by a DRI Canada Certification Commissioner.

☑ **Years of Experience:** You need at least 2 years of significant and practical experience in Business Continuity. The online application will track the experience that you input. You will only be able to submit the application once the 24-month minimum has been met.

☑ **Reference Required:** For each of the Professional Practices that you select, you will be required to provide two references. The same two references can be used for each Professional Practice, or different references can be provided, depending on your particular situation. You can provide more than two references if needed.

PP# **# of PP Subject Areas:** For the CBCP, you are required to have sufficient experience in five of the Professional Practices. You can complete more than five if you have additional experience. PPs are clearly marked with this green icon.

CORE **# of Core PP Subject Areas (3,4,6,8):** Two of the five Professional Practices that you complete must be Core Professional Practices. So, two Core and three others are required. In this guide, and in the online application, CORE PPs are clearly marked with this dark blue icon.

Since the other charts relate to different certifications, you can disregard them for the CBCP application. If you are not certain that the CBCP is the right certification to apply for, review the others in more detail.

☑ **Select Your Certification:** After the various charts, you will be prompted to select the certification that you are applying for, from the drop-down menu provided. Making this selection will then populate your application form with the correct requirements and enable tracking as you input your information.

☑ **Name on Certificate:** Input the name you want to appear on your CBCP Certificate, should your application be successful. Check the spelling!

☑ **Save and Continue:** Congratulations, you have officially started your application! You can now start to write your essays, and input your experience and references.

[Save and Continue]

To demonstrate both how to complete the Professional Practice Subject Area elements of the application form, and to show an example of each element, we will follow the application of Robyn Green. This is a fictional but representative case study.

Choosing the Best Certification Level

Robyn's first step is to choose the right level of certification based on her work.

As her body of experience grows, she is keeping track of her work in order to apply for the next level of certification for DRI Canada. Being in a position with responsibilities in several of the DRI International Professional Practices, she decides that Certified Business Continuity Professional (CBCP) is the direction she will take. Robyn is more of a generalist than a specialist, providing advice to Division BCM Leads on how to maintain their plans, and establishing an overall structure that ensures the Ministry's BCM is suitable.

She recognizes that Certified Functional Continuity Professional (CFCP) is better suited to professionals who have been in a more concentrated area of professional practice. A CBCP needs to show two or more years of experience in at least five of the DRI International Professional Practices, while a CFCP needs to show experience in at least three Professional Practices over two or more years. One level should not be seen as higher or lower than the other – they are better seen as a reflection of whether your work has been more generalist, or specialist.

Given that Robyn has been more of a generalist in her Continuity Management career, CBCP is the best fit.

Application Dashboard

The online process will now take you another page which functions as your application Dashboard for the remainder of the application process.

Each component of this Dashboard page is briefly introduced below. The rest of this guide then takes you in-depth into completing the various aspects of your application.

Instructions

This section reminds you of the minimum requirements of the application, and then provides some advice for completing the application. This guide will have additional tips, marked with this icon:

Professional Practices Tracking Chart

This is where the system tracks you through the process of entering information into the online form. It makes it easier to know where you left off, but there are some things to watch out for.

1. **One row for each of the ten Professional Practices** (called Subject Areas in this form).

2. **All CORE Professional Practices** are identified with this CORE .

3. **The online form tracks and shows your progress.** The right-hand number is the minimum entries you must complete, and the left-hand number is how many you have completed.

4. **The green checkmark** ✓ indicates that you've reached (or exceeded) the minimum number of entries for that requirement.

5. **"Broken Image"** ⚠ indicates that you have not met the minimum.

6. **The Completed? column** shows which Subject Areas you have completed all the requirements for ✓ and which are incomplete ✗ . Since you need 5 of the 10 Professional Practices, you may have up to 5 incomplete markers.

7. **The Actions column** gives you access to the form for each Subject Area. The green plus sign ➕ allows you to open a new Subject Area. The pencil ✏ allows you to edit a Subject Area that you have previously worked on. You can edit at any time up until you submit the application.

8. **Each Subject Area** has a variable number of Options that demonstrate professional experience. The right-hand number in this column indicates the minimum options required. This is not listed on the form itself, so you'll need to refer back here.

9. There are 750 words required for each of five Professional Practices.

10. **There is a minimum of** two **references for each Subject Area and a minimum of one Experience.** You may have more than the minimum in each case.

Experience

Total Experience on Application: **19.25 months** ❌
Minimum Required: 24 months

This screenshot shows an application in process. Your total experience entered will automatically update here as you complete the application. When you meet the minimum months required, the ❌ will change to a ✅.

References

Please note that you may use the same reference for multiple Professional Practice areas.

Reference Name	Email	Phone	Relationship	Years Known	Assigned	Actions
Kelly Levesque	Levesque@any.gov.ca	123-456-7890	Manager	14	Assigned	✏️ ❌
Jean Perez	jean.perez	234-567-8901	Assistant Deputy Minister	12	Assigned	✏️ ❌
Akira Ito	akira.ito@any.gov.ca		Director	10	Unassigned	✏️ ❌

This section tracks all of the references you have entered at any point in your application. It is a good quick list for contacting references prior to submitting your application, and ensuring that all the information is correct. It also tells you if each reference has been assigned to at least one Professional Practice Subject Area.

Payment Information

Invoice	Amount	Paid?	View
LMS Application: CBCP	400.00	Not Paid 🔍	

Make Payment

You will need to pay the application fee before you can submit your application. Remember that this fee includes a one-year DRI Canada membership.

Completion Tracker

Total Areas Completed: **1**
Total Core Areas Completed: **0**

This shows your progress in completing the application form. For every ✅ in the Completed? column of your dashboard, your total here will increase by 1. When a CORE Area has a ✅ that number will increase by one.

> *Remember: A ✅ will be assigned when you have met the minimum requirements in each of References, SMA Essays, Subject Area Options, and Experiences. Only you will know whether you have finished entering all relevant information. For instance, you may have met the minimum word requirement for an essay, but need to say more to show the breadth and depth of your experience. Or, you may want to include an extra reference for one Subject Area.*

Submission Button

Submit Application | Cancel

The Submit Application button will remain pale green and will not work until your Completion Tracker shows Total Areas Completed: 5 and Total Core Areas Completed: 2, and you have paid the application fee. Then, this button will be bright green and clickable. **Be sure to review your application in full before submitting!**

Professional Practice Subject Area Editor

When you click on the ✚ or the ✏, the editor for that Professional Practice Subject Area will open. This is where you will enter all of the information needed for that Professional Practice Subject Area. This section of the guide will take you step-by-step through each part of the editor.

Professional Practice Subject Area Editor   ✕

Professional Practice Subject Area:
01. Program Management

Choosing Your Professional Practices

A candidate may provide information in as many of the Professional Practices as they wish. However, it is critical that you choose ones in which you can demonstrate significant experience.

Take some time to review your work history, mapping your duties to the Professional Practices. Consider the following, and make some notes, in a chart or other format that works for you:

- From your CV, pull out a list of all roles where you had Business Continuity duties

- For each of those roles, note which Professional Practices you worked within

- Write out what you did and how you did it

When you have done that for all of your Business Continuity work, you should have a good idea of where your experience lies. Select the five Professional Practices that make the most sense to include in your application.

CASE STUDY

Choosing Your Professional Practices

Robyn has done work in more than five of the Professional Practices, but only needs to show work in five.

Robyn decides that the five she will present for her application are Program Management, Business Impact Analysis, Incident Preparedness and Response, Plan Development and Implementation, and Awareness and Training Programs. She is confident that her work in these areas can be clearly explained and supported by strong references.

Professional Practice Subject Area Options

Please specify the main activities groups in which you can demonstrate professional experience

☐ 1. Establish the need for Business Continuity Program.   ☑ 2. Obtain support and funding for the business continuity program.   ☑ 3. Coordinate and manage the implementation of the BCM program throughout the entity.

Each Professional Practice Subject Area has a range of associated activities where you may have professional experience. For reference, the full list is included at the end of this document, as Appendix III.

For each of the Professional Practice Subject Areas that you choose to complete, you will need to select at least the minimum number of Options. When you write your essays, you will need to demonstrate your experience in each of these Options, so they also act as a guide for your essays.

Remember: The Subject Area Options column on your Dashboard indicates the minimum number of Options required for each of the Subject Areas.

Selecting Your Options

CASE STUDY

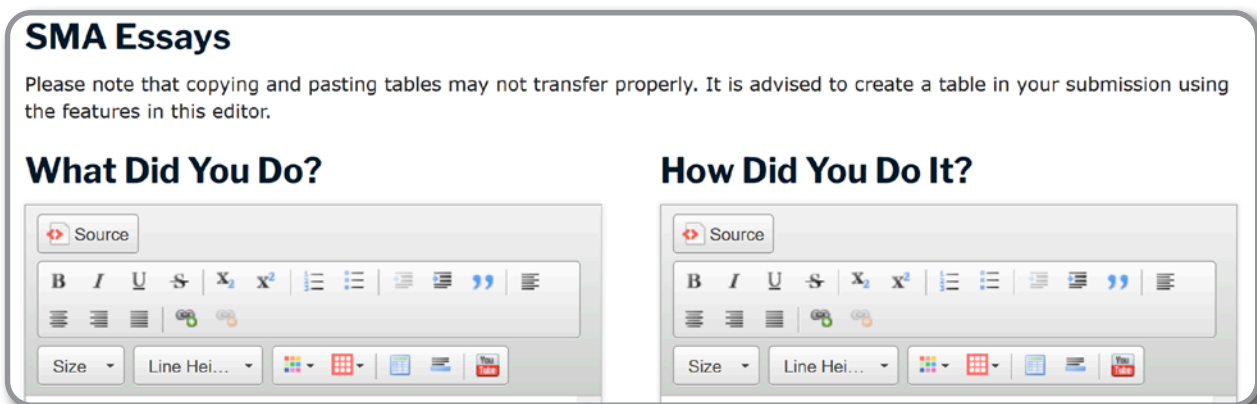When Robyn was asked to take the lead on implementing a Continuity Management program, the need for such a program had already been identified. Her activities in Professional Practice 01: Program Management, were in Options 2 and 3.

Robyn checked her application Dashboard and saw that the minimum of number of Options required for this Professional Practice Subject Area is two, so she has met the requirement.

SMA Essays

Using the Essay Editor

SMA Essays

Please note that copying and pasting tables may not transfer properly. It is advised to create a table in your submission using the features in this editor.

What Did You Do?

How Did You Do It?

For each Professional Practice Subject Area, you will need to complete two essays: **What Did You Do?** and **How Did You Do It?**.

It worth taking a few minutes to familiarize yourself with the Essay Editor. Hover your mouse over each of the icons to see what that icon does.

Your essay format can be as simple as copy-and-paste from a Word document. You may choose to embed relevant links, YouTube clips, and/or do additional formatting.

> *Since the editor window is quite small, you may find it helpful to write your essays in your usual word processing program. It will be easier to see the whole essays, and revise them, in this way. You can then copy-and-paste into the editor before doing any formatting or using the other editor functions.*

The **content** of your essays is more important than the **formatting**. Do make sure it is easy to read and follow, but don't add unnecessary bells and whistles. The format supports readability.

If you have experience in more than one role, you can use a table or other formatting to separate the experience by role. It is recommended that you create any tables in your word processing program and then copy it into the Subject Area Editor.

Writing Your SMA Essays

The certification application asks you to describe what you did, and how you did it. Remember, the Commissioners are going to be evaluating how you have applied the DRI International Professional Practices in your job(s). You can find a complete write-up of these practices in *The Professional Practices for Business Continuity Management*, 2023, DRI International. An overview is reprinted in the Resource section of this guide, as Appendix II.

It is worth reading the Professional Practices closely and describing your work in a manner that explains how you have applied the Professional Practices. Focus on simple, clear, and detailed descriptions that explain:

What Did You Do?:

The task or responsibility, how long you did it (with dates), and the outcome.

How Did You Do It?:

The way you applied the DRI International Professional Practices to do those things.

A total of 750 words per Professional Practice is usually enough to provide the detail needed for Commissioners to decide if you've met the requirements. Use plain language, and short, uncomplicated sentences. It's important that public safety professionals use clear, clean, and brief language when they communicate, and your certification application is a chance to show those skills.

SMA Essays

Robyn is now ready to get started writing. For each of Robyn's case study Professional Practice Subject Areas, we will show her two essays, along with some commentary and tips.

There are additional tips for writing strong essays in each of the case study examples that follow.

SMA Essays

CASE STUDY

What Did You Do?

Ministry of Public Works: Policy Analyst

While acting as a Policy Analyst, I completed an 18-month assignment, from January 2004 to June 2005, where I developed and implemented the Ministry's Continuity Management Program. I was responsible for the overall design and project management, ensuring the Divisions completed their plan, and implementing an overarching plan for the Ministry to ensure a coordinated approach. This also required updating existing policy to align with the plan's mission and objectives, as well as writing standards for the Ministry and its various Divisions. The completed plan also included terms of reference for BCM Division Teams. For 18 months in this position, work in this professional practice represented about 40 per cent of my time. The outcome of this work was an approved Ministry-wide plan, with integrated Divisional procedures.

Ministry of Public Works: BCM Coordinator

In my current role, I am responsible for the overall management of the same program. As the program has reached a state of maturity, I am responsible for maintaining and developing the plan and supporting employees in order to maintain the overall readiness in the Ministry. I also monitor the budget and have accumulated ten years of analysis regarding the impact of the Continuity Management Program on the Ministry budget, including recovery from incidents. I report to the Ministry's Executive Operations Committee quarterly, and submit a formal annual Continuity Management Program Report. I keep up with research and best practice in Business Continuity Management in order to recommend updates to the plan as evidence warrants. For the last ten years (2009-2019), work in this professional practice has represented about 20 per cent of my time.

Robyn wants to highlight the 18 months she spent developing the Ministry's BCM Program, and the work she's done for the last ten years to manage the same program. She needs to explain what she did, how she did it, and for how long.

Because she's talking about two distinct jobs with different and distinct responsibilities, she needs to be sure her application keeps those things separate and clear. Robyn uses headings to separate information about each role. These headings match how she enters her Experience (company and role).

SMA Essays

CASE STUDY

How Did You Do It?

Ministry of Public Works: Policy Analyst

While acting as the Policy Analyst, I was tasked with developing an overall business case and implementation plan for approval by the Ministry's Executive Operations Committee. I developed a project proposal that outlined a plan and explained how my proposal would satisfy the legal requirement for the Ministry to have a plan, as well as provide a suitable control for the risks that were identified. My proposal included a mandate, vision and mission statements, timeline, reporting requirements and milestones, the need for an executive champion, and the required resources and budget.

When my proposal was approved, I implemented project management principles to meet the project timelines, reporting requirements, and objectives. I worked with Ministry staff to explain the work needed, provided them with working tools, and supported and reviewed their work. As the plan was nearing completion, I developed a proposal for the Executive Operations Committee on how to maintain and sustain the program. This included ongoing work to re-evaluate and prioritize critical priorities, regular assessment of risk and controls, and training and exercise programs to ensure the readiness of employees.

Ministry of Public Works: BCM Coordinator

In 2009, I moved into a position with responsibility for managing the program that I had worked to develop. At this point, the Ministry's BCM Program is in a much more mature state. The program framework is in place and the budget requirements are well established, My work in this professional practice is focused less on these areas, and more on other areas such as Risk Evaluation, verification and updates to the plan, and training and development that pushes and builds the Ministry's level of readiness.

Application essays focus on your business continuity / disaster recovery planning responsibilities and accomplishments by mapping your experience to the Professional Practices for Business Continuity Management. Use this document as a resource as you write your essays.

SMA Essays

CASE STUDY

What Did You Do?

Ministry of Public Works: Policy Analyst

While on an 18-month assignment where I led development of the Ministry's BCM Program, I designed and implemented the Ministry's BIA tool. The outcome of this work was a tool that included quantitative and qualitative criteria for assessing various types of impacts of events on business continuity, specific to the Ministry and its Divisions. The tool also included explanations and examples of different data gathering and analysis methodologies, so that Divisions are able to select ones that best suit their context. I was responsible for checking the BIAs done by each Division, ensuring they were complete and consistent, and working with their author to make sure they were correct. From January 2004 to June 2005, working in this professional practice represented 30 per cent of my time.

Ministry of Public Works: Policy Division BCM Lead

At the end of the assignment, I returned to my position and was my Division's BCM Lead. I was responsible for ensuring the Division's BIAs were complete and current. For a period of 4 years 2 months (July 2005-August 2009), this represented 10 per cent of my time.

Ministry of Public Works: BCM Coordinator

In my current position, I am responsible for ensuring all BIAs in the Ministry are correct and updated. In 2011, I completed a project to revise the BIA working documents, and this has been adopted government wide. My focus has shifted more toward the evaluation of risks and controls to address deficiencies and gaps. For the last ten years, working on BIAs has represented 15 per cent of my time.

In each of her last three positions, Robyn has done a lot of work with BIAs, and each position has been slightly different. She needs to show what she did for each, and how it differed.

SMA Essays

How Did You Do It?

Ministry of Public Works: Policy Analyst

While on the assignment to develop the Ministry's program, the focus of my work was to develop a BIA tool that represented best practices while also capturing the criticality and functional requirements of our business functions. I recognized that this level of information would require an organization wide effort, drawing on the knowledge of subject matter experts. Draft assessment criteria were reviewed by key experts as well as leadership prior to their integration into the BIA tool. Once the tool was adopted, I secured a commitment from the Deputy Minister that all required staff would make a priority of completing their BIA, and I formed working groups to support the completion of BIAs.

Ministry of Public Works: Policy Division BCM Lead

When I returned to my primary position after the project, BCM was not my main focus. In order to ensure that the Division's BIAs were complete and current, I periodically reviewed the documentation, met with the Division Team Leads, and checked for any changes in evidence-based practice. During this period, I was responsible for updating the Division's BIAs on an annual basis, or more often if required.

Ministry of Public Works: BCM Coordinator

In my position managing the Program, BIAs have been well established and are familiar to Ministry. My focus is on maintaining them and ensuring that they are consistent, updated, and properly reflected in the government's overall ranking of mission critical functions. I also work to ensure our BIAs are adjusted if any other Ministry or external agency makes a change that may affect our ability to deliver mission critical functions. I provide an annual report for the Executive Operations Committee that reviews all of our BIAs.

Write your application in the first person. For example, use "I", not "we" or "my team".

These essays describe and explain what you have done and how you did it. Focus on your own work and actions.

SMA Essays

CASE STUDY

What Did You Do?

Ministry of Public Works: Policy Analyst

During my time as the Policy Analyst leading the development of the BCM Program, I was involved with one plan activation. This involved a fire in our Headquarters in March 2004, and I was designated as the Incident Commander who led the activation and implementation of the Plan. This response involved a three-week period. Along with the After Action Review, this represented 5 per cent of my time during this assignment. The lessons learned from this incident were incorporated into the final version of the Ministry's BCM Program.

Ministry of Public Works: Policy Division BCM Lead

When I returned to my primary position, I was involved with two incident responses, involving the loss of IT services in our Directorate for a three day period, and a security incident that required activation of the plan for a one week period. This represented under 5 per cent of my time over a five-year period. In reports on these two quite different incidents, the strengths of the BCM Plan were highlighted and recommendations to clarify responses to different types of incidents were adopted.

Ministry of Public Works: BCM Coordinator

In my current position, I have been Incident Commander in six activations of the Ministry's plan, including: a labour disruption in January 2010 (one month), a power outage in April 2010 (three days), a flood involving loss of our IT servers in August 2012 (three weeks), a fire affecting our regional branch in Centretown in July 2015 (two months), a blizzard that affected our human and IT resources in November 2017 (one day) and the loss of electrical and utilities in January 2018 (two days). This represented 5 per cent of my time over this ten-year period.

Like most Continuity Professionals, responding to actual incidents is a small portion of her time, but it represents an important section of practice. Like many professionals, it's something that she's very proud of, and could talk about at length. Keeping in mind that she has limited space to work in, the best approach is to provide the Commissioners with a snapshot of the event, focusing on her role.

SMA Essays

CASE STUDY

How Did You Do It?

Ministry of Public Works: Policy Analyst

During the assignment where I was developing the Ministry's BCM Program, a plan activation was required due to a fire in our Headquarters. The plan had been completed and was still in the process of being implemented through a roll-out and education to all Divisions. I was directed by the Deputy Minister to implement the plan. I established an Incident Command System and worked as the Incident Commander. I established an Emergency Operations Centre from my office, worked with Divisions to identify losses and evaluate business priorities, and convened the Executive Operations Committee to implement a response and recovery plan. Afterward, I completed an After Action Review.

Ministry of Public Works: Policy Division BCM Lead

When I returned to my primary position, I was designated my Division's BCM lead. There were two incident responses that I worked on. My Division was not directly affected, but I was deployed to the Emergency Operations Centre and worked as a member of the Emergency Control Group. My role was to find resources and equipment in my Division to support the critical business functions that had been directly affected.

Ministry of Public Works: BCM Coordinator

In my current position, I am responsible for leading the response when a plan activation is triggered. I work with the Deputy Minister to recommend activation of the Plan, and I am the default Incident Commander. I work with each Division's BCM Lead to staff the EOC, to evaluate impacts and disruptions, and to implement a Plan that allows critical business functions to continue. I provide regular reports to the Executive Operations Committee, and I escalate information and requests for assistance to the Government's central Emergency Coordination Centre. I am responsible for coordinating with external agencies to support the implementation of the plan. After each activation, I lead an After Action Review and a process to revise the Plan based on the experience.

Use your own words to describe your work in each of the 10 professional practice areas.

When documenting professional practice areas, avoid copying information. Tell us in your own words what you have done in each professional practice area.

Do not just copy from your CV or from Professional Practices for Business Continuity Management.

Avoid using the services of a professional writer.

SMA Essays

CASE STUDY

What Did You Do?

Ministry of Public Works: Policy Analyst

During the 18-month period when I was developing the Ministry's Continuity Management Program, I designed recovery strategies for each area of operations. I created a structure for the plan documentation that aligned with the Ministry's operational structures. The outcome of that process was plan documentation for incident management, crisis management and communications, recovery site activation, and a technology recovery plan. I worked directly with the Executive Operations Committee in the development and approval of this plan. Work in this Professional Practice represented about 15% of my time in this role.

Ministry of Public Works: BCM Coordinator

In my ten years in this role, I have continued to review and update the Ministry's BCM Plan on an annual basis, with two more substantive updates. As part of the full review in 2011, I conducted an assessment of the plan documentation. This assessment, and review of After Action incident reports and analysis, led to the identification of a need for a recovery team and associated plan, as well as significant updates to the technology recovery plan. Changes in Ministry policy around use of printed materials and digital storage warranted updating the document distribution and control procedures. Following the 2023 update to Professional Practices for Business Continuity Management, another review and update was conducted. Both of these processes resulted in a new version of the Ministry's BCM Plan and documentation. In this role, I've spent 20% of my time on this Professional Practice over the past ten years, including reporting to the Executive Operations Committee on an annual basis or more often if needed.

Since Robyn developed her employer's BCM Program and has been managing it for 10 years, her essays for this Professional Practice cover both development and implementation activities.

Your essays may look quite different if your role has been exclusively in developing new BCM programs, for instance as a consultant, or managing programs developed by others, if you are an employee in a continuing role.

Robyn has experience leading the development of a BCM plan in her role on a volunteer Board. She could also include this experience in her essays for this PP.

SMA Essays

CASE STUDY

How Did You Do It?

Ministry of Public Works: Policy Analyst

In order to develop recovery strategies for the Ministry's plan, I familiarized myself with general Business Continuity strategies and reviewed a range of strategies from similar government Ministries. I researched legal requirements and outlined what needed to be included in the content of the plan, and each of the specific management and recovery plans. I drafted each section of the plan, then reviewed each with the relevant leadership and personnel for clarity and relevance to their regular operations and procedures. The final plans were adopted and distributed to the approved list of personnel.

Ministry of Public Works: BCM Coordinator

The two substantive updates to the BCM Plan required me to identify changes to the content of the documentation, due to changes in legislation or BCM Professional Practices. In order to identify these needs, I reviewed all relevant legislation and updated Professional Practices, and spoke to subject matter experts in technology recovery. I also identified changes within the Ministry structure and procedures that led to expanding the plan documentation into areas that were not previously needed. As I have been the default Incident Commander for several incidents of different types, I have seen the management and recovery plans in action. Following each incident, I made changes to the documentation, clarifying roles and responsibilities. I also regularly update notification procedures to fit with the Ministry's current internal communications practices. I also created and implemented a version control system to ensure that only the most current documentation is in use.

Since this is an application for professional certification, we expect you to have the needed information and to provide it completely, accurately, and succinctly.

Edit your work for clarity and proofread it.

Avoid exaggeration, overly academic language, or philosophical statements. Focus on the facts.

SMA Essays

CASE STUDY

What Did You Do?

Ministry of Public Works: Policy Analyst

My 18-month assignment to develop a Continuity Management Program did not include a significant amount of work on training programs. As part of my final report, I made several recommendations for training during the implementation and continuing management of the BCM Program. These recommendations focused on the objectives of an awareness and training program. This represented less than 5% of my time in this role.

Ministry of Public Works: BCM Coordinator

When I became BCM Coordinator, the training program consisted of documentation that was included in employee handbooks and an introductory workshop on general BCM procedures. I conducted a needs assessment with each Division to determine how well the existing training served them and to identify gaps in training or differences in needs at the Division or employee level. I designed and implemented a tiered training program that provides employees with a level of training that is suitable for their duties and responsibilities during a plan activation. I recognized that some people in leadership positions were having difficulty with their BIAs, so I developed a BIA workshop. I have also developed a module on BCM as part of the Ministry's training for new employees. In the last two years, I've created a train-the-trainer program and there are now six senior employees who can deliver one or more workshops in the BCM training program. Over ten years in this role, 10% of my time has been spent on Awareness and Training activities. The outcome of the tiered training program has been increased success during activations and higher reported levels of confidence by employees and leadership.

Robyn recognized at the start of this program that having engaged and knowledgeable people is critical to the success of the Ministry's program. When she worked in the design of the program, this need was identified. When she was moved into a position to manage the program, she has made a point of using awareness and training to build the foundation for a strong, sustainable program.

SMA Essays

How Did You Do It?

Ministry of Public Works: Policy Analyst

In developing training recommendations for my final report on the Ministry's Continuity Management Program, I noted key topics for training, identified who should be trained, and noted a range of training methodologies that are specifically useful for incident and recovery procedures.

Ministry of Public Works: BCM Coordinator

I have developed, and deliver, three levels of training for Ministry employees. The first level is a one-day course that provides a level of awareness about the overall plan, and the role of an employee who may be involved but will not be functioning in a leadership position. The second level of training provides a further level of information for Division Leads and Managers, and provides these employees with the tools to lead their unit during a plan activation and function effectively within the broader overall structure. The third level of training is for executives, and provides the knowledge for them to coordinate strategic activities and integrate with the whole of government response. All employees are required to complete this training every two years.

I developed a BIA workshop to help Division Leads and Managers understand the steps required for completing their BIA correctly. I deliver this course about once every 18 months, or as requested. All new employees are required to complete a two-day orientation when they join the Ministry, As part of this, I have developed a one hour module on BCM. This provides them with a basic overview on the program until they can complete the first level of training. I deliver this course about twice a year, or as requested. The new train-the-trainer workshop that I developed and deliver consists of a full-day on training methodologies, as well as half-day modules on delivering each of the workshops in the program.

A Commissioner can ask for additional detailed information only once. So, be as thorough as possible in your response to this request. Failure to respond accurately can result in an unsuccessful application.

The minimum essay length is 250 words. We've found that 1000-1500 words is the range that is usually sufficient detail.

For practical reasons, essays in this case study have been kept to about 250 words.

References

Procedures for Applicants

References: ⓘ

Please choose or add at least 2 references for this Professional Practice Subject Area
Use the buttons below to add as many references as you like to this area

[Add New Reference]   [Add Existing Reference]

In the Subject Area Editor, immediately following the SMA Essays section, you'll see the References section.

ⓘ *Click on this icon, in the application, to see more information about selecting References.*

- To add your first reference, or a new one, click **Add New Reference**.
- The Reference Editor will pop-up on your screen.

Reference Editor   ✖

ⓘ Instructions

Add a new reference to the application using the form below:

First Name   [   ]

Last Name   [   ]

Email   [   ]

Phone   [   ]

Relationship [   ]
              (Supervisor, Manager, Client, etc.)

Years Known   [   ] years

[Save and Continue]   [Cancel]

Once you've input and saved the information, that reference will be available to be assigned to any Professional Practice Subject Area. Simply click **Add Existing Reference** and open the Select Reference drop-down menu to make your choice.

Reference Editor ✕

ⓘ Instructions

Select a reference from the list below to add them to this section

[--Select Reference-- ▾]

[Save and Continue] [Cancel]

The list of references that you have selected for a Professional Practice Subject Area will appear in the Subject Area Editor for that Professional Practice, under the heading **Current References**. If you change your mind and want to remove a reference, click on the ❌ . This will remove the reference from that Professional Practice Subject Area. The reference will remain available to be assigned (the entry will not be removed from the system). An entry can only be completely removed in the References area of your Dashboard.

Current References:

Name	Email	Relationship	Years Known	Phone	Actions
Kelly Levesque	Levesque@any.gov.ca	Manager	14	123-456-7890	✗
Jean Perez	jean.perez	Assistant Deputy Minister	12	234-567-8901	✗

Remember, you can see your full list of References on your Dashboard. All references that you enter, whether assigned to a Professional Practice Subject Area of not, will be listed there.

Reference Procedures for Applicants

CASE STUDY

A professional reference is required for each Professional Practice that a candidate identifies. Robyn has identified her Director, who has been her supervisor since 2010. She has also identified the Manager who supervised her during the BCM project development, who can provide a reference for three of her Professional Practices. The Assistant Deputy Minister is well positioned to provide a reference for two other Professional Practices.

Strong and clear references make for a strong Certification application. Robyn has checked in advance with each and has given them some information to help them provide a reference. She has sent each reference an email with an overview of the DRI Canada Certification process, along with a short summary of the work that she is going to presenting in her application. This kind of information will help the reference to understand the certification process, and give them a chance to think about their work with Robyn.

A successful Certification application will include professional references that affirm the candidate is being complete and honest with the information they provide.

It's necessary to have at least two references for each Professional Practice, but that doesn't necessarily need to be the same two throughout the application.

The Commissioners that review your application will depend on the written attestation of your references to verify the work you've done. It's perfectly fair for you to provide your references with your application essays for them to consider when they are providing you with a reference.

From time to time, the Commissioners may contact a reference if they have any questions or need clarification. For this reason, their contact information is required.

Please be sure your references are aware that they may be contacted.

References should be people that you report to, not those who report to you.

Consultants should list as references clients who can validate their experience.

Procedures for Referees

Once you submit your application, the review process begins. Part of that is the reference review. At this point, all Referees receive an email with a link and an access code for them to review it. They can only see the things that you marked them as a reference for. They can either press a button for "Verify" or "Not Verified" and they will have an opportunity to enter notes.

The Certification Commissioners will be able to see the Referees responses, including any notes. You, as the applicant, will not see those responses or notes.

CASE STUDY

Procedures for Referees

Robyn has three references that she uses throughout her application. One reference, Akiko Ito, has only been assigned to two Professional Practice Subject Areas. When contacted to verify Robyn's Experience and Essays, Akiko will only see those two Professional Practice Subject Areas.

On the other hand, Kelly Levesque has been Robyn's supervisor in two of her positions with the Ministry of Public Works, and is able to confirm Robyn's Experience and Essays for all five Professional Practice Subject Areas. Robyn has assigned Kelly to all five Areas, so Kelly will be able to see them all when contacted to verify the information.

Experience

Experience:

Please choose or add a timeline of your experience for this certification area
Use the buttons below to add as many different experience periods as you like
After adding an entry, you will need to assign a reference to verify it

Set down in months the time applied to each practice area.

Add Experience

The final section to complete for each Professional Practice Subject Area is your experience.

When you click **Add Experience**, the Experience Editor will appear.

Experience Editor ✖

Add experience to the application using the form below:

Company

Start Date

End Date

Save and Continue   Cancel

Like with your References, once you have entered Experience, it will be available for each of the Professional Practice Subject Areas.

You will need to assign a reference to attest that your experience in that area is accurate, and to answer any questions that Commissioners reviewing your application may have.

Current Experience:

Company	Start	End	Time in Months	Assigned References (check to assign reference)	Actions
Ministry of Public Works: Policy Analyst	01/01/2004	06/30/2005	8.5 months	☑ Kelly Levesque - Levesque@any.gov.ca ☐ Jean Perez - jean.perez	✏️ ❌
Ministry of Public Works: BCM Coordinator	09/01/2009	05/01/2019	29 months	☑ Kelly Levesque - Levesque@any.gov.ca ☐ Jean Perez - jean.perez	✏️ ❌

Experience

CASE STUDY

Robyn has held three roles with BCM duties. Each of these roles is entered as a separate Experience. Then, a percentage of her time in that role is entered for each relevant Professional Practice.

When Robyn thinks about her work activities in her current role, she divides her time between the following activities:

- Program Initiation and Management – 20 per cent
- Business Impact Analysis – 15 per cent
- Business Continuity Strategies – 10 per cent
- Incident Response – 5 per cent
- Plan Development and Implementation – 20 per cent
- Awareness and Training Programs – 10 per cent
- Coordination with External Agencies – 10 per cent

Along with that, around 10 per cent of Robyn's time is spent doing administrative tasks, and other duties that are not related to Continuity Management.

When she enters her information in the Experience Editor, Robyn uses the percentage option that is mathematically closest to her actual experience.

For instance, for her Experience in Program Initiation and Management, she indicates 25%. Then, in her **What Did I Do** essay for that Professional Practice, she ensures that she notes her actual 20% experience.

Everyone likes to say they gave 110 per cent, but it's an impossibility to work more than 100 per cent of your job. When your certification application is done, something is wrong if the percentage of time you listed in each professional practice adds up to more than 100 per cent.

When Robyn completes her certification, she is submitting information only on work around five professional practices (in italics in the case study). When the percentages from those five professional practices are added up, it comes out to 70 percent. This is not something that will cause the Commissioners to be alarmed. Since it honestly reflects how much time Robyn spends in these areas, it gives a good, clear picture of her work.

Paying the Application Fee

The final step before submitting your CBCP application is to pay the application fee.

$400

- **Non-refundable**

- **Includes one-year DRI Canada membership**

Once your payment has been processed, the **Submit Application** button will be available to you.

If you pay by cheque, this will be done once the cheque has been received at the DRI Canada office.

Payment Information

Invoice	Amount	Paid?	View
LMS Application: CBCP	400.00	Not Paid *check payment indicated*	🔍

Make Payment

Submitting Your Application

Payment Information

Invoice	Amount	Paid?	View
LMS Application: CBCP	400.00	Paid *check payment indicated* 🔍	

Total Areas Completed: **5**
Total Core Areas Completed: **2**

All minimum requirements for the certification have been met. When you are ready you can submit your application by clicking on the submit application button below

Submit Application	Cancel

Once you have completed your application, check it thoroughly. Unless you complete all required sections, your application will not be considered.

It is not possible to download a copy of the completed application, so be sure to keep copies of your Essays. You can also take screenshots of your information.

When you click the **Submit Application** button, there will be one chance to change your mind, via a pop-up **Submission Confirmation**.

Submission Confirmation ✖

Are you sure you want to submit your application? After your application has been submitted it will enter the approval process and you will be unable to make further changes. Click Submit Application to confirm and continue.

Submit Application	Cancel

Once you confirm by clicking **Submit Application**, you will see the screen shown below. You will also receive an automated confirmation by email.

Application Submitted

Congratulations, your application for certification has been submitted. Your application is now in the approval process and is locked for editing.

You can check on the status of your application on the main page, and if further information is required you will be notified by email.

IMPORTANT NOTE:
Inform your **References** about your application. Ask for their prompt assistance when DRI CANADA requests validation of your experience and Subject Area pages. Incomplete applications cause delays in the process, and we may require additional steps and requests to you for additional information.

[Return to the main page]

To check the status of your application, go to your Application for Certification page (the same location as you've been using to work on your application) and look at the Current Applications section.

Current Applications

Search: [   ]

Certification	Status	Functions
CBCP	Reference Review (0/3)	🔍

Show 100 entries
Showing 1 to 1 of 1 entries

If you have questions about the application or the application process, please contact the DRI Canada office by writing **certification@dri.ca** or calling **toll-free 1-844-228-8135** (local 416-646-2750).

What Next?

DRI Canada's Certification Commissioners will be notified once an application is received, and they will work quickly to complete their review. This usually takes about 30 days, but it might be longer depending on the number of pending applications, or the complexity of those applications. If have questions about the status of your application, please contact DRI Canada and we'll be glad to check for you.

Resources

Appendix I: About DRI Canada and DRI International

DRI Canada is an affiliate of DRI International which is based in New York, NY. The Canadian and U.S. organizations have published *Professional Practices for Business Continuity Practitioners*, which sets the international baseline levels for the knowledge and capabilities of business continuity planning / disaster recovery professionals.

DRI Canada was incorporated as a not-for-profit organization in 1996 to:

- Promote commonly accepted understanding across the business continuity planning/disaster recovery industry through education, assistance and the development of a resource based on the Ten Professional Practices

- Certify qualified business continuity planning/disaster recovery professionals

- Promote the credibility and professionalism of certified business continuity planning/disaster recovery professionals

DRI Canada serves Canada's business continuity planning / disaster recovery profession by promoting the Ten Professional Practices and providing internationally recognized education and certification services.

DRI Canada Code of Ethics

DRI International requires its certified professionals to adhere to a strict code of ethics, and recertification demands a continuing commitment. Certified business continuity professionals will:

- Practice the highest level of professionalism at all times in the performance of our duties;

- Practice conduct that is legal and ethical and will avoid any perception of conflict of interest for ourselves, our employers, and our clients;

- Practice and promote corporate continuity and disaster recovery concepts;

- Keep confidential any information revealed as such in the performance of our duties;

- Continually seek to increase our competence and the competence of those who work with us;

- Participate in continuing professional knowledge and skill improvement programs.

PP01: Program Management

- Establish the need for a business continuity program.
- Introduce key concepts, such as program management, risk awareness, impact to critical functions/processes, recovery strategies, training and awareness, and exercising/testing.

PP02: Risk Assessment

- Identify risks that could impact an entity's resources, processes or reputation.
- Assess risks to determine the potential impacts to the entity, enabling the entity to determine the most effective means to reduce them.

PP03: Business Impact Analysis — CORE

- Identify and prioritize all of the entity's functions, processes, and dependencies in order to determine the greatest impact upon the entity should the functions not be available. This analysis should be retained and available to assist the entity in understanding incidents and/or the resulting consequences. Quantify the impact to the entity, its services, and the affected parties.
- Analyze, document, and communicate the findings to highlight all gaps between the entity's requirements and its current capabilities.

PP04: Business Continuity Strategies — CORE

- Select strategies to reduce gaps as identified during the risk assessment and business impact analysis.
- Identify the major functions of the entity, including potential third-party service providers, with the support of the responsible party for the business impact analysis.

PP05: Incident Preparedness and Response

- Understand the types of incidents that could threaten life, property, operations, or the environment and their potential impacts.
- Establish and maintain capabilities to protect life, property, operations, and the environment from potential incidents through the implementation of an incident management system to command, control, and coordinate response, continuity, and recovery activities with internal and external resources.

PP06: Plan Development and Implementation — CORE

- Document plans to be used during an incident that will enable the entity to continue to function.
- Define the exercise/testing criteria to validate that the plans will accomplish the desired goal.

PP07: Awareness and Training Programs

- Establish and maintain training and awareness programs that result in personnel being able to respond to disruptive incidents in a calm and efficient manner.

PP08: Business Continuity Plan Exercise/Test, Assessment, and Maintenance — CORE

- Establish a business continuity plan exercise/test, assessment and maintenance program to maintain a state of readiness of the entity.

PP09: Crisis Communications

- Create and maintain a crisis communications plan.
- Ensure that the crisis communications plan will provide for timely, effective communication with internal and external parties.

PP10: Coordination with External Agencies and Resources

- Establish policies and procedures to coordinate response activities with applicable public entities and private resources in accordance with Professional Practice Five: Incident Preparedness and Response.

Appendix III: Professional Practice Subject Area Options (Activities)

These are the options that you have for demonstrating your professional experience in each of the Professional Practice Subject Areas. They are gathered here for easy reference, with the minimum requirement noted for each.

PP01: Program Management (2 required)

1. Establish the need for a business continuity program.

2. Obtain support and funding for the business continuity program. Create documentation to facilitate leadership program adoption and ongoing support.

3. Coordinate and/or lead the implementation of the business continuity program throughout the entity.

PP02: Risk Assessment (3 required)

1. Work with leadership and any risk management groups to gain agreement on a risk assessment methodology.

2. Identify, develop, and implement information-gathering activities across the entity to identify risks.

3. Determine the probability and impact of the identified risks.

4. Evaluate the impact of risks on those factors that are essential to conducting the entity's operations.

5. Identify and evaluate the effectiveness of controls employed to reduce the impact of exposures.

6. Document and present the risk and vulnerability assessment and recommendations to leadership for approval.

7. Request approval from leadership to develop the entity's risk appetite to use as a basis for the management of an ongoing risk assessment process.

PP03: Business Impact Analysis (4 required) ———————————————— CORE

1. Identify and document the qualitative and quantitative criteria to be used to assess the impact to the entity resulting from an incident.

2. Recommend objectives and scope for the business impact analysis process.

3. Establish the criteria and methodology to be used in conducting the business impact analysis process.

4. Analyze the collected data against the approved criteria to establish a recovery time objective (RTO), recovery point objective (RPO), and resources for each operational area and its supporting technology.

5. Prepare and present the business impact analysis results to leadership. Gain acceptance of the recovery time objectives, recovery point objectives, and resources as detailed in the business impact analysis.

PP04: Business Continuity Strategies (3 required) — CORE

1. Utilize the data collected during the risk assessment and business impact analysis to identify the available continuity and recovery strategies for the entity's operations that will meet the recovery time objective, recovery point objective, and recovery requirements as identified in the business impact analysis.

2. Protect vital hardcopy records that may be in jeopardy of being destroyed.

3. Utilize the data collected during the risk assessment and business impact analysis to identify continuity and recovery strategies for the entity's technology in order to meet the recovery time objectives and recovery point objectives as defined in the business impact analysis.

4. Identify supply chain issues (for both suppliers and customers) from the business impact analysis that may affect recovery strategy selection.

5. Assess the cost of implementing identified strategies through a cost/benefit analysis.

6. Recommend strategies and obtain approval from leadership to implement.

PP05: Incident Preparedness and Response (3 required) — CORE

1. Identify hazards that could threaten life, damage property, interrupt operations, or contaminate the environment.

2. Identify applicable health and safety, fire, life safety, national security, environmental, cyber, and information security regulations enforceable by federal, state/provincial/regional, and/or local government.

3. Identify the availability and capabilities of internal and external resources required to protect life, property, and the environment for the identified types of incidents.

4. Identify and assess incident preparedness and response plans based on the risk assessment and vulnerabilities of assets at risk, as well as the availability and capabilities of existing internal and external resources.

5. Conduct a resource needs assessment.

6. Review incident preparedness and response plans.

7. Recommend the development, and assist with the implementation of, an incident management system for command, control, and coordination of resources during response activities.

8. Review incident preparedness and response plans and procedures with response personnel, and assist with the coordination of relevant internal and external agencies and resources.

9. Obtain and document formal leadership approval of plans and procedures.

PP06: Plan Development and Implementation (2 required) — CORE

1. Use the approved strategies developed in Professional Practice Four: Business Continuity Strategies as the basis for plan documentation.

2. Define the structure for the plan documentation.

3. Coordinate the effort to document recovery plans for the entity's operations and the supporting infrastructure. Consider plan types based on the needs of the entity.

4. Publish the plan documents.

PP07: Awareness and Training Programs (3 required)

1. Establish the objectives and components of the business continuity awareness and training program.

2. Identify the awareness and training requirements across the entity's functions.

3. Prioritize the awareness and training requirements for entity personnel.

4. Develop the methodology for the awareness and training program for the entity.

5. Identify, develop, or acquire awareness and training tools and resources needed to meet the objectives of the program.

6. Oversee the delivery of the activities conducted to accomplish the objectives of the awareness and training program.

PP08: Business Continuity Plan Exercise/Test, Assessment, and Maintenance (3 required) — CORE

1. Establish an exercise/test program.

2. Establish a plan maintenance program.

3. Identify appropriate governance.

4. Establish an audit process for the business continuity program.

5. Provide written recommendations based on the exercise/test results, including revisions to strategies and plans if desired outcomes cannot be met.

PP09: Crisis Communications (2 required)

1. Design, develop, and implement a crisis communications plan.

2. Communicate and train members of the crisis communications team on their roles and responsibilities.

3. Exercise/test the crisis communications plan.

4. Review and update the crisis communications plan on at least an annual basis or more frequently if exercise/test results, regulations or changes to the entity warrant.

PP10: Coordination with External Agencies and Resources (1 required)

1. Identify and establish incident response procedures for the entity in accordance with Professional Practice Five: Incident Preparedness and Response.

2. Identify applicable incident preparedness and response guidelines and the agencies having jurisdiction over the entity.

3. Coordinate incident response procedures with external agencies and resources.