



2023 Utility Security Training

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Utility Focused Security Training

Utility employees need robust violence prevention and incident response skills. InDev Tactical is the industry resource for security training and consulting that meets the unique needs of the utility sector.

“Scaring people isn’t training. Graphic imagery and aggressive tactics do little more than create anxiety and leave you with a frustrated and resentful audience. Training comes through understanding, connection, and repetition. Then you build to the necessary level of intensity but never exceed it; that’s how you train.” Jim Willis

We know utilities and security. Jim Willis, CEO of InDev Tactical, is a combat veteran with an extensive utility and security background. He is an experienced utility industry professional and a credentialed security expert with assignments in 41 countries and conflict zones. Jim’s formal education includes a bachelor’s in Electric Engineering and a master’s in development and security. In addition, he’s received extensive security training from defense and multilateral agencies. Jim used this expertise and knowledge to develop *ASSIST*. You can learn more about Jim’s experience in the attached bio.

ASSIST - Active Shooter & Security Incident Safety Training is InDev Tactical’s violence prevention training program. It focuses on practical incident response skills needed by today’s utility employees.

InDev’s programs are designed for infrastructure utilities and tailored to meet your needs.

Our most popular training program

ASSIST - Active Shooter & Security Incident Safety Training® ***Recognizing and Responding to Threats***

Single Subject Training Sessions

<u>A</u> ctive Shooter	<i>Critical Event</i> response, the keys to survival
<u>S</u> ecurity Preparedness	Planning for enhanced security
<u>S</u> ituational Awareness	Threat recognition in the field and office
<u>I</u> ncident Control	De-escalating aggression and hostility
<u>S</u> pecial Event Security	Meeting and special event security planning and response
<u>T</u> aking the Initiative	Critical event management and response for executive staff
<i>Crisis+ 15 Minutes</i>	A practical approach to crisis resiliency
<i>Media Savvy</i>	Media preparation for key staff and executives
<i>Employee Public Relations</i>	What every employee must know about public relations

Active Shooter Exercises

Optional nonaggressive exercises for the *ASSIST* active shooter training. The exercises use a blank firing weapon pointed at the floor in various locations within the building. These “walk-thru” exercises focus on sharpening threat recognition and response skills without unnecessary stress, anxiety, or trauma.

Active Shooter Drills

Level I - low-intensity drills that introduce the basics of active shooter situations

Level II - basic drills with increased intensity and tension, but not overly aggressive or trauma-inducing

Level III – complex drills with greater intensity and realism

Contents

Utility Focused Security Training	2
ASSIST: Active Shooter & Security Incident Safety Training.....	4
Recognizing and Responding to Threats	4
Single Subject Training Programs	5
Active Shooter: <i>Critical Event</i> response, the keys to survival.....	6
Security Preparedness: Planning for enhanced security	7
Situational/Threat Awareness: Needed in the field and office.....	8
Incident Control: De-escalation training	9
Special Event Security: Meeting and special event protection.....	10
Taking the Initiative - Crisis management and critical incident response.....	11
Crisis + 15 Minutes	12
Media Savvy	13
Employee Public Relations	14
Board and C-Suite Security Issues.....	15
Active Shooter Response Drills.....	16
Trainer Bio - Jim Willis <small>MSC, CMAS, CHS-V</small>	17

ASSIST: Active Shooter & Security Incident Safety Training

Recognizing and Responding to Threats

ASSIST - Active Shooter & Security Incident Safety Training. This interactive training looks at the realities of workplace violence. It introduces the skills needed to identify threats, de-escalate hostility, and respond to violence.

Subject/Topics

1. Violence Prevention
2. Situational / Threat Awareness
3. De-escalation
4. Active Shooter Response

Length: Half-day & Full-day options



Objectives: Following this training, participants will -

- Understand how worldviews and culture, and myths and misconceptions impact security
- Gain the skills needed to deal with violence and survive a critical event
- Gain confidence in their ability to recognize and respond to aggression

Program Outline

Session One. Perspective & Concepts: Focuses on introducing basic concepts and issues facing organizations today. The session reviews past and present attitudes toward the utility sector, the impact of societal worldviews, evolving security issues, and potential terrorism.

Session Two. Violence Prevention: An introduction to workplace violence and methods of avoiding conflict, including workplace violence, its forms, triggers, and prevention.

Session Three. Situational Awareness: Introduces situational awareness and its importance to personal security. Topics include the Jeff Cooper awareness color-codes system and pre-attack indicators.

Session Four. De-escalation: Recognizing the elements of aggression, body language, micro-expressions, and trigger words. Topics include verbal command of situations to defuse, de-escalate, and establish authority and knowing when to abandon reconciliation and withdraw.

Session Five. Active Shooter: Introduces the three stages of a critical event. This session focuses on recognition and response to protect yourself *before* – *and* – *after* the police arrive.

Wrap-up / Final Q&A: The program's final discussion and Q&A session to address any remaining concerns.

OPTIONAL - Active Shooter Exercises

These low-intensity “walk-thru” exercises help employees recognize and respond to violence. The exercises take place throughout the training session using blank-firing weapons. No weapon is pointed or fired at participants, and there is no physical contact or engagement. The outcome is sharpened threat perception skills without undue stress or anxiety.

Certification: Certificate of Completion

Approved for CLCP Continuing Ed Credits (CECs)



Single Subject Training Programs

The following training sessions focus on a specific subject.

Each program is formatted as a half-day session.

However, each can be modified to be delivered as a shorter session.

Active Shooter: *Critical Event* response, the keys to survival

“ASSIST” is InDev’s proprietary active shooter response training. This presentation provides your staff with the knowledge, confidence, and skills needed to deal with the onset of a critical event (active shooter or other lethal threat). In addition, it offers techniques for surviving a lethal encounter, identifies options to consider, and proactive methods of countering an attack.

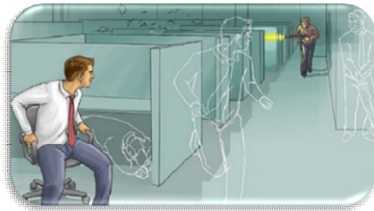
ASSIST® provides employees with the skills and confidence needed to deal with violence. It dispels myths and misconceptions about violence and presents simple techniques for surviving a critical event.

InDev can include *Active Shooter* exercises in the training. These low-stress exercises add complexity and engagement without overt aggressiveness and instill proactive response to violence skills.

Attendees engage in confidence-building exercises that introduce reliable survival skills.



ASSIST® - Active Shooter Response



A – Action
S – Shield
S – Survey
I – Intervene
S – Survive
T – Transition

ASSIST – Active Shooter Response Training:

- Is approved for *CLCP* continuing education credits
- Meets OSHA workplace violence training recommendations¹
- Satisfies federal annual counterterrorism training requirements
- Instills confidence and reduces fear and anxiety
- Introduces skills needed for surviving the *violent first minutes*

Length: Half-day

Certification: Certificate of Completion

Approved for CLCP Continuing Ed Credits (CECs)

© Copyright, 2011 James M. Willis All Rights Reserved. ASSIST, *Active Shooter and Security Incident Safety Training*, and related materials.
1 OSHA now identifies workplace violence and active shooter situations as recognizable hazards covered under General Duty Clause, Section 5(a)(1)

Security Preparedness: Planning for enhanced security

Today, employees face increasing peril of violence from activism, extremism, and terrorism. Confrontations with angry and desperate people, violent protesters, and individuals willing to inflict harm are commonplace in the office and the field.

This training provides an understanding of the causes of violence and strategies for recognizing and responding to threats. It identifies the characteristics of workplace violence, triggering events, and methods of avoiding conflict. The session also investigates terrorism and ways of reducing facility and infrastructure vulnerability.



Topics Include:

- Understating workplace violence
- Developing an effective violence prevention plan
- Signs alone won't cut it - proactive security control measures
- Security audits, the foundation of preparedness
- The role of active shooter training and drills; a two-edged-sword
- Preparing a tactical response
- Understanding extremism, terrorism, and indicators of terroristic activity
- Target hardening – reducing employee, facility, and infrastructure vulnerability
- Effective table-top security exercises

Learning Outcomes:

After training, participants will be more able to recognize and address security issues in the organization and the basic skills needed for avoiding and responding to violence and terrorism. With the completion of the program, the participant will have greater confidence in their ability to identify a potential threat, quickly develop a pragmatic response, and avoid harm to themselves and others.

BENEFITS:

- Improved safety of staff
- Increased security for employees and facilities
- Reduced litigation risk

Length: Half-day and Full-day training options

Certification: Certificate of Completion *Approved for CLCP Continuing Ed Credits (CECs)*

Who Should Take This Course?

Managers, staff, and anyone tasked with developing security response plans and those responsible for Operational system and facility design, training, and safety.

Situational/Threat Awareness: Needed in the field and office

The potential for violence is becoming an everyday work-related reality. Employees face threats from angry customers to zealous protesters and thieves to terrorists, sociopaths, and psychopaths. Today your office and field staff face the increasing potential of being harmed by another person.

This training prepares employees to recognize potential threats and effectively respond before an incident escalates to violence or walking into an unsafe situation. In addition, the program introduces strategies for personal safety, awareness, and personal protective measures, actions, and tactics.

The training can focus on issues facing your office staff, the unique needs of outside employees, or both.



Topics Include:

1. Understanding situational awareness
2. Daily habits to improve awareness
3. Danger recognition
4. Understanding the *Cooper Awareness Scale*
5. Behavioral warning signs, body language, and micro-expressions
6. Controlling fluid situations and de-escalation
7. Breaking contact and escape

Learning Outcomes:

After training, participants will better understand situational awareness and have greater competencies in recognizing, avoiding, and escaping dangerous situations.

BENEFITS:

- Improved safety of staff
- Increased employee confidence in dealing with aggression and violence
- Reduced litigation risk

Length: Typically presented as a half-day training session.

Certification: *Certificates of Completion* can be provided

Approved for CLCP Continuing Ed Credits (CECs)

Who Should Take This Course?

Managers, staff, and employees that regularly meet the public, especially those that meet with clients in potentially risky or remote locations

Incident Control: De-escalation training

Verbal altercations, if left unchecked, can escalate into physical violence. Today utility employees face an increasingly aggressive and antagonistic public. And minor issues are often intensified by feelings of entitlement and hypersensitivity. This training provides employees with the skills to recognize growing hostility and effectively address aggression.

The course instills the confidence needed to deal effectively with challenging behavior. It introduces de-escalation techniques to help understand and modify aggressive behavior and resolve conflict.



Course Focus: The training focuses on the specific needs of the participants.

F1. Interior: CSRs, HR, administrative, and other internal operations personnel

F2. Exterior: Field staff; ground crews, arborists, construction, R/W, and service personnel

F3. Fused: Covers critical aspects of the interior and exterior training for diverse audiences

F4. Supervisors: Focuses on team leader skills development (separate internal & external, or fused)

F5. Executive staff: Includes practical application and policy and procedure considerations

Training Includes:

- Recognizing aggression and warning signs
- Maintaining a professional presence
- Managing hostility and proactive communication
- Identifying perilous situations and recognizing when and how to exit
- *ASSIST* Verbal Self-Defense® - Assess, Safeguard, Strategy, Investigate, Solve, Transition

Learning Outcomes:

At the end of the course, participants will have the skills to recognize and counter aggressive behavior. In addition, participants will have increased confidence in their ability to identify threats, gain situational control, and de-escalate volatile encounters.

BENEFITS:

- Improved employee safety
- Increased staff confidence in dealing with aggression and violence
- Reduced risk of litigation

Length: Typically presented as a half-day training session.

Certification: Certificates of Completion can be provided

Approved for CLCP Continuing Ed Credits(CECs)

Special Event Security: Meeting and special event protection

Recent tragedies have shown that large gatherings, meetings, and special events are vulnerable to acts of violence. Though large-scale atrocities at events remain rare, their consequences can be devastating. Extreme activism and terrorism are real concerns, and the speed at which disturbances morph into hostility is astounding. Though you can't circumvent motives, you can make it difficult to act on them. Event attendees expect and deserve thoughtful consideration for their well-being. This training develops event security skills.



Topics Include:

- The changing dynamics of event planning, what has changed, and why
- A strategic approach to event security planning
- Outside assistance, statewide and national associations, and security consultants
- Local law enforcement is a critical security resource but not a security sole-source
- Securing dignitaries and special guests
- Dealing with widescale emergency response to an unexpected crisis
- Scenario-based training and tabletop exercises
- Staging and implementing event security
- Post Event "hot-wash," debrief, and "lessons-learned"

Learning Outcomes:

After training, participants will be competent in planning secure meetings and special events and better prepared to respond to unexpected emergencies and crises.

BENEFITS:

- Improved staff capabilities and competencies
- Increased security for visitors, guests, and staff
- Reduced litigation risk

Length: Typically presented as a half-day training session.

Certification: Certificate of Completion *Approved for CLCP Continuing Ed Credits (CECs)*

Who Should Attend?

Managers, staff, and employees with responsibility for meeting and event planning and implementation

Taking the Initiative - Crisis management and critical incident response

Crisis management begins the moment incident begins and continues well after the action stops; the immediate aftermath is just beginning. Therefore, it is essential to be prepared before a critical event. Preparedness allows you to respond effectively and stabilize the organization and attend to the needs of employees and members.

This training helps prepare your staff and board to deal with a crisis as it develops and explores what to do once the immediate danger has passed. The training focuses on resolving critical event issues and effectively managing the aftermath. In addition, it looks at issues relating to employees and their families and public relations and media issues.



Topics Include:

- Active crisis management – doing what must be done
- Managing the chaos of an active incident
- The fluid state of crisis management today
- Damage control, what can and can't be controlled
- Utilizing national and statewide association resources
- The role of operations and security in crisis management
- Who says what; the role of a spokesperson
- The role of the board during a crisis
- Crisis communication – “you must manage the message.”
- Preplanning and desktop exercises are critical to surviving a crisis
- “Created crisis,” dealing with activists and subversive activity

Learning Outcomes:

After training, participants will have the skills needed to respond effectively to the aftermath of violence or other critical events. Attendees will understand how crisis communication is changing and effective message control. In addition, participants acquire skills needed to control the flow of communication and address aftermath issues regarding investigators, journalists, and the public.

BENEFITS:

- Improved crisis response and resilience
- Increased confidence in dealing with crisis
- Reduced litigation risk

Length: Half-day short course or Full-day training

Certification: Certificate of Completion *Approved for CLCP Continuing Ed Credits (CECs)*

Who Should Take This Course?

This course is recommended for key managers, staff, and employees regularly meeting the public.

Crisis + 15 Minutes

A practical approach to aftermath management and resiliency

Security crisis management begins the moment incident begins. However, it doesn't end when the action stops. The hard work of dealing with the ensuing aftermath is just beginning. The steps you take will have lasting repercussions on the organization and employees. The damage from this type of event will have long-lasting and deeply emotional impacts.



This training helps your staff and board prepare to deal effectively with the longer-term impacts of a critical event and explores what to do once the immediate danger has passed. The training focuses on resolving critical issues created by the event and effectively managing the aftermath. In addition, it looks at issues involved with dealing with employees and their families and managing public relations and the media.

Topics Include:

- Active crisis management – doing what must be done
- Managing chaos – what can and cannot be controlled
- Dealing with the aftermath of a critical event
- Damage control and aftershock management
- Taking stock and assessing physical and human damage
- Developing recovery action plans – short-term and long-term
- Maintaining the long-term message
- The aftermath investigations
- Getting back up, dusting yourself off, and moving on (the world didn't stop turning)

Learning Outcomes:

After training, participants will be competent in responding to a critical incident's aftermath and long-term impacts. Participants will learn to assess what has happened, damage assessment, and the steps to eventual recovery.

BENEFITS:

- Improved crisis response and resilience
- Increased confidence in dealing with crisis
- Reduced litigation risk

Length: Typically presented as a half-day training session.

Certification: Certificate of Completion *Approved for CLCP Continuing Ed Credits (CECs)*

Who Should Take This Course? Managers, staff, and key employees

Media Savvy

Preparing staff and executives to speak under any circumstance

Learn skills for dealing with the media, and the counter of pseudo-journalism

Participants gain the confidence to speak effectively in interviews, press conferences, and *in the field*. Topics include:

- 1) An overview of the media relations and press
- 2) Strategies for effective communication and presentations
- 3) How to prepare for a media event and crisis communication
- 4) Interview techniques
- 5) Videotaping exercises for each participant with individual "playback" coaching



The program focuses on effective communication and interaction, safeguarding the organization's image, dealing with hostile interviewers, and crisis communication. Recorded exercises allow participants to practice presentations in front of a camera with coaching to enhance confidence and effectiveness.

Topics Include:

1. The basics of communication
 - Speaking with clarity and confidence
 - Tact, discretion, and compassion
 - Using tone and inflection to enhance communication
 - Avoiding slang, company-speak, terminology, and jargon
 - Unspoken messages in gestures and body language
2. Presenting a professional presence
 - Dress professionally without losing your individuality
 - Poise and composure, and nonverbal communication
 - Grace, under pressure, remaining professional under stress
 - Target acquisition and rendition - Staying *on topic*
3. Interview tools & techniques
 - Managing the message – laying the groundwork for a successful communication
 - "No Comment" equals guilt; What not to say to a reporter or during an interview
 - Advocating a position
 - Dealing with hostile media and deflecting ambush interview questions
 - Avoiding "soundbite suicide" and recovering from blunders

BENEFITS:

- Increased staff confidence in dealing with the media
- Reduced risk of litigation or damaged public image

Length: Typically presented as a half-day training session.

Certification: *Certificate of Completion*

*Approved for **CLCP** Continuing Ed Credits*

Employee Public Relations

What every employee needs to know about Public Relations

One overlooked reality of communication is that every employee “*speaks for the company.*” Therefore, effective public relations must be a company-wide effort. Every employee must understand that they constantly communicate messages about the organization. This training helps employees understand their role in building and maintaining a positive organizational image. In addition, this program covers; dealing with public perception, the need for message clarity and consistency, and how every employee can support the organization’s PR team.



Topics

1. *Public relations: “Fragile- Handle with Care”*

Employees can be unaware of their impact on public relations and how people view an organization. Section #1 introduces basic concepts, including how easily the utility’s image can be damaged. Next, it introduces the need for the right message to be clear, concise, and consistent. Finally, it provides a clear understanding of the critical roles of the PR team and the organization’s spokesperson(s).

2. *“Like it or not, you speak for the company”*

What your employees say in public carries weight, and what they do reflects on the company. This session focuses on the fact that, to someone, every employee is the face of the organization.

3. *Unintended Consequences*

The session looks at how seemingly harmless acts and gestures can impact public relations and identifies techniques to help keep the organization’s image intact during daily operations.

4. *The Media is not what it appears*

The media was once the domain of professional journalists and photographers but now includes anyone with a cell phone. Today, anyone with a cell phone can record and upload an event, accident, or conflict. Section #3 focuses on aggressive media tactics and those looking for a story or soundbite.

5. *Social Justice Warriors*

Topic five is a look at the creation of informal consortiums such as “First Amendment Auditors” and other social justice groups that seek out opportunities to create conflict. These groups use aggressive tactics meant to provoke angry responses from unsuspecting victims. If not handled well, these encounters can become nightmares.

6. *Crisis Situations, “keeping the media wolves at bay till help arrives.”*

The media can appear in unlikely places, especially when contentious issues arise, at accident scenes, and during crises. Both amateur and professional media will ambush the initial employees at a critical incident, so critical event communication must start with them. We look at fundamental strategies for maintaining message control in high-stress situations until the official spokesperson arrives.

BENEFITS:

- Increased employee confidence in dealing with the media
- Reduced risk of litigation or damaged public image

Length: Typically presented as a half-day training session.

Certification: *Certificate of Completion*

*Approved for **CLCP** Continuing Ed Credits*

Board and C-Suite Security Issues

Security concepts for the senior level executives

This training provides the board of directors and executive staff with crucial security concepts. It fosters an understanding of their role in building and maintaining the utility's security stance.

This session explores a myriad of board-level security issues. The session offers insights on enhancing security and setting the course for a more secure utility.



Sessions are tailored with executive staff guidance to ensure that issues and techniques discussed function effectively within the organizational framework. This guidance ensures the training complements the Utility's policies and strategies and reinforces the CEO's position as the ultimate head of security.

Topics can include board-level workplace violence and active shooter training and activities (including active shooter exercises)

BENEFITS:

- Increased confidence in dealing effectively with security-related issues
- An Enhanced sense of purpose and a clearer vision of the security goals and objectives
- Improved organizational alignment on security-related issues
- Reduced risk of litigation or damaged public image

Length: Typically, a two or three-hour session

Active Shooter Response Drills

*We can help your team prepare for the worst-case scenario - **an Active Shooter!***

InDev conducts Active Shooter response training to help you improve your organization's state of readiness. The drills test existing active shooter response procedures, appraise workforce preparedness, and introduce survival skills and techniques.

What is the InDev difference?

We create positive employee experiences based on real-world conflict expertise. InDev drills focus on recognizing what's happening and understanding how to improve your odds of surviving an encounter. Our goal is to build skills and confidence and reduce fear and anxiety.



Exercises

InDev offers an **Active Shooter Response Exercise** option for the ASSIST training session. These low-intensity exercises enhance recognition and response skills using nonaggressive tactics or techniques.

Drills

InDev has three active shooter drill levels of increasing intensity and complexity. No matter the drill level, we -

*Provide the expertise and equipment needed to conduct the drill.
Coordinate with local law enforcement, first responders, and neighboring facilities.*

Level I: low-stress and intensity events covering the basic steps needed to survive.

Level II: intermediate exercises with higher-level interaction and complexity.

Level III: full-scale, complex drills that engage law enforcement and emergency response resources.

Length: Varies typically 2 to 3 hours on site required to implement

A typical Level II exercise includes:

1. Developing an *Action Plan*
 - Establish exercise goals and objectives
 - Conduct a site appraisal
 - Develop scenarios & Assign roles
2. A Pre-Drill Conference
 - A facility-wide meeting is held, typically 1 to 9 days before the drill
 - To explain the goals exercise goals & guidelines
 - Covers exercise “do’s and don’ts.”
 - Answer questions and address concerns
3. The Drill
 - **Start** - initial contact/gunfire and drill announcement
 - **Execution** of the scenario selected
 - **End** – End-of-drill announcement
4. Post-Drill
 - Hot-wash and debriefing to collect information and insights
 - Drill Summation Report - findings, recommendations, and suggested next step

Trainer Bio - Jim Willis

MSc, CMAS, CHS-V

Jim Willis, President of InDev Tactical, is an electrical engineer, international development specialist, and security expert with over 40 years of utility sector experience. After a tour of duty in the Navy, Jim began his power system career as a second-generation lineman. He has worked as a power system engineer, utility executive, and international development specialist.



Jim is a Certified Master Antiterrorism Specialist and Homeland Security Expert. He has expertise in conflict/post-conflict security operations and organizational and infrastructure security. Jim has worked in 37 countries for corporate, government, and multilateral clients. He spent seven years in Afghanistan providing power system restoration assistance, security operations, situational oversight, and training.

Domestically Jim works with clients to enhance organizational security. He used his security and utility expertise to develop the ASSIST training series. This program offers practical, non-intrusive training designed to fit into the organizational framework of the specific client.

Education

Master of Science (MSc) in International Development (Security emphasis)
Bachelor of Science (BS) in Electrical Engineering (Electric power focus)
Associate Degrees (AA & AAT) in Pre-engineering and Electrical Power

Security Training

Jim's security skills development includes training from the - Dept of Homeland Security, Defense Security Service, UN Dept of Safety & Security, and Naval Postgraduate School.

Certifications

Certified Master Antiterrorism Specialist, Antiterrorism Accreditation Board
Homeland Security Expert Level V, American Board of Certification in Homeland Security
METT Expert, Ekman Institute

Membership:

Society for International Development (SID-Washington)
The Institute of Electrical and Electronics Engineers (IEEE)
International Executive Security Association (IESA)
International NGO Safety and Security Association (INSSA)
International Association for Counterterrorism and Security Professionals (IACSP)
Overseas Security Advisory Council (OSAC)
The Maritime Security Centre – Horn of Africa (MSCHOA)
National Utility Training and Safety Education Association (NUTSEA)