

## Best's Insurance Law Podcast

### [School Security and Emergency Planning - Episode #238](#)

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**Hosted by:** John Czuba, Managing Editor

**Guest Expert:** Joe Hendry from [Cosecure Enterprise Risk Solutions](#)

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**John Czuba:** Welcome to “Best's Insurance Law Podcast”, the broadcast about timely and important legal issues affecting the insurance industry. I'm John Czuba, manager of *Best's Insurance Professional Resources*.

We're very pleased to have with us today Joe Hendry from qualified member expert service provider, [Cosecure Enterprise Risk Solutions](#).

Joe is an expert in civilian law enforcement responses to active threats, designated by the Ohio Department of Homeland Security and the Ohio Attorney General's Office.

He served six years in the US Marine Corps and spent 27 years with the Kent State Police Department. Joe serves as an expert service provider in risk assessment, expert witness and safety analysis for the insurance industry.

He's board-certified as a physical security professional by ASIS International, and he also serves as the education co-chair for the International School Safety and Security Community.

Joe is one of 50 international specialists who developed the international school safety standard under ASIS International. He also serves on NFPA 3000 as a special expert, and his company, COSECURE, was selected to provide subject matter expertise to the federal Cybersecurity and Infrastructure Agency's School Safety Task Force. Joe Hendry is currently serving as an SME in this role.

Joe, we're very pleased to have you with us again this morning.

**Joe Hendry:** Thank you, John. Very happy to be back.

**John:** Today's discussion with Joe is going to be on school security and emergency planning. Joe, for our first question today, why is having an emergency plan not emergency planning?

**Joe:** It's very important to make that distinction. We have a lot of emergency plans that float around. Some states have their own and how to assess them, states like Pennsylvania and Texas.

There are national plans out there and there's a lot of check the box systems that go on with these, for better or worse in some locations, but it gives you a template on how to write an emergency operation plan.

While having that emergency operation plan is very, very important, it doesn't necessarily mean that you're doing emergency planning.

Having a location fill out a template and check the boxes on something that says, "Yes, we have this," doesn't necessarily mean that locations are training to that emergency operation plan, that that plan was implemented and signed off of correctly, that the community was involved in it. It just simply says that we have one.

That becomes extremely important and we see this a lot of times in failures. There's locations – Parkland, Uvalde, we can go through basically the day and name them, Oxford's another one – where there were emergency plans in place.

They all worked or didn't work to varying degrees at those locations, but the post-incident analysis said all of them had emergency operation plans. It wasn't necessarily that the emergency operation plan failed completely or even failed at all. What actually happened was the emergency planning was incorrect for a lot of these things, like the Uvalde incident.

One of the things that jumped out at me when I was first reading that report is here's this emergency operation plan. It's the state of Texas. The state of Texas is very, very tight with their schools and having emergency operation plans.

They have their own police department at that school, and that police department didn't even have keys for their own buildings. That's a huge piece that gets missed, and that's not something that should be missed in the emergency planning development phase because there should be an assessment of that.

It doesn't look like an assessment happened. That is the basis for the emergency operation plan, is having that assessment and looking at it and making sure that everything in that plan is being done correctly.

When that plan needs to be called up and utilized, that it really, really fits in with what it's attempting to solve.

Whether that's something very serious like an active shooter or a chemical spill close to a school, or even a traffic accident out in front of the building where someone's injured and they have to put the emergency operation plan in effect because the school maybe can't dismiss at the end of the day.

All of those things need to be coordinated through the community. Just having an emergency plan on paper doesn't mean that the emergency planning piece was done.

**John:** Joe, why does emergency planning need both little and big-picture thinking?

**Joe:** The big picture is what you really need to look at and then narrow things down to, "What specifically do we have to do for each one of these emergencies?"

Big picture is we need to have an emergency operation plan for a school that's next to a railroad track or within maybe a mile of a railroad track that there's the potential for a chemical spill or a train derailment that it's going to affect school operations. That is a very big picture.

We would need to do coordination with local authorities and emergency planning. What do our emergency responders tell us from the fire department? What if children are outside when this happens and there's a chemical spill? Like what happened here in Ohio where I live up in the East Liverpool area a few years ago.

Having that plan is very big picture. All of these people need to be involved. Then you got to start thinking, what's that little picture specifically for us for an educational location? Many times, do we think about what do we need to do in response? We think about one thing, which is, "Well, how do we dismiss that day?"

What happens in that little picture is what if we can't dismiss that day and we have to keep everybody in school for an extended period of time? The other thing is very basic stuff that's response to that particular incident, where not only do we have to secure in place inside the school, but also what do we have to do to make that school secure for the environment that it's now facing?

This goes way beyond something for a threat outside of a school where we need to lock the doors. This may actually mean we need to tape windows shut. Do we have the ability and capabilities to do that to prevent from maybe a poisonous gas from coming into a school?

How do we let everyone know how we do that, which involves all of your small-picture communication systems? How do we notify properly students and staff in the building? How do we notify parents? How do we notify the neighborhood what's going on? That takes that big picture down to a very, very small group of people.

How do we keep students occupied? How long do we have the capability to stay inside a building? I've done assessments in California where the schools are required to have water and food on hand for up to 96 hours in some location. Hospitals are the same way.

We don't do that nationally across the country, but that's probably something that we really, really need to look at. I can tell you many times when I've seen emergency operation plans and assess them, that part is very, very basic for a derailment. It says, "Oh, we're going to stay inside the school and wait till authorities notify us that we can leave."

That doesn't address in an annex, which gets down to the nitty gritty for the response, what needs to be happening inside the building? How are we securing the building? How are we making sure that we have enough food if we need to stay?

What happens if we can't evacuate the location and we may need to stay way beyond what's happening? That three o'clock dismissal might not be till nine o'clock at night. What happens if the derailment's so serious that we have to spend overnight inside the facility? What does that look like?

A lot of locations don't plan that way because they're doing a checkbox emergency plan, but not the emergency planning pieces, John.

**John:** Joe, how do you identify what preparation, response, and recovery look like for a successful plan?

**Joe:** One of the important things in that preparation phase is getting all of your stakeholders together. That may mean, from my time sitting on NFPA 3000, this got brought forward to me, is sometimes the planning that we do is very, very narrow.

School emergency operation planning is a tendency to look at our emergency plan, we follow a template, we fill it out, we turn it into the state. Maybe we get law enforcement involved. Occasionally, I see emergency services involved, like fire or EMS.

What I don't see a lot of times is the relationship between the school and the community being fleshed out. The emergency service providers are sometimes involved in the planning. What's not involved in the planning is what is the city level event going to look at? How is the mayor's office going to be involved in this?

What are the communication systems that we're going to utilize as a community to get information out not only to the school itself, but the larger population as a whole? How does communication between a school or a school district work with the communication systems that are being utilized by a community?

Are there text message systems? Are there emails? Are there PA announcements in some locations? How does that all work? The other thing that is part of that preparation for successful plan is how does the school's emergency operation plan fall into the overall county or city emergency operation plan.

A lot of times, I don't see the emergency planners, especially from really large cities or even counties. How does this incident affect everyone at once? How does the schools fit into this plan? What does it look like?

Who is the representative from the school system that may need to be in a command post with the emergency operations team providing information, especially if you have a large incident in a city or communities affected overall, that is going to be the person that is communicating all of the information to the schools?

At Uvalde, one of the incidents that happened there is the school was putting out information that was separate from the law enforcement information that was going out. At one point, the school put out information that there were no casualties in the incident at Uvalde about a half an hour after the incident happened, where law enforcement obviously knew that there had been casualties.

That's not what you want happening during an emergency. That mistake is still affecting relationships today between the school and the community, especially the people that had people that were injured, people that were lost. That has a long-term effect.

Having that preparation response done correctly with all the community members helps solve some of those issues, so in the long run, it doesn't affect you, especially in your recovery.

The other part of that preparation phase is looking at your response and training your response. Many times, I'll see an emergency operation plan, and I worked an expert witness case where this happened. There was a school that had an active shooter drill go south on them. There was a lot of problems with how the drill had been set up.

Beyond that, when I was investigating the case, one of the things I found was the school had, in their response emergency operation plan, that they were doing the traditional single-option lockdown that was in the emergency operation plan.

That plan had been turned into the state. The state had said their plan was OK. What happened was during the incident and then in its aftermath, I found out that the school had been verbally telling people and the staff and the students that they were receiving ALICE training for active shooter and not lockdown.

Then further on down the line during the investigatory process, I found out that they had not only not received traditional lockdown training and had not received ALICE training, what they had actually trained was a video from a university that was showing run, hide, fight in a five-minute video and that had been shown to the staff and the students.

By the way, that was the only training that they had received. While the emergency operation plan was OK, the entire planning process was not overseen correctly. Basically, they had three competing programs that supposedly they were utilizing.

The one they ended up actually training was not either the plan that they had in their emergency operation plan, which was lockdown. It wasn't what they were telling people, which was ALICE training. It ended up being a run, hide, fight video that was produced at a university level that had not anything to do with the educational environment that it was being shown in.

That response ended up not going well during a drill. Luckily, it was not during a real incident because that could have had very negative consequences for a large segment of that population and led to a lot of casualties.

Having that response thought out, trained properly, and brought out to the community so everyone in that community knew what was happening is very important. That response is thought out in the preparation phase.

The recovery also needs to be thought out in that preparation phase. You don't want to have to have recovery being thought out after the incident in real time. The Oxford incident in Michigan, this occurred in the immediate aftermath of the incident.

There were two things that affected not only the students involved in the incident, but the community in the aftermath, and especially the staff at the school. One of the first things is when you plan for recovery, you plan for recovery in the preparation phase.

When the shooting happens, there's about 1,800 students in the school. It's during a class change, which does not lend itself to traditional lockdown. The school had trained in multi-option response and they had trained in ALICE.

Because it's in the hallways when the incident happens and it's class change, over 1,000 students in that school and staff members self-evacuated, and they had been told to go to a Meijer's grocery store as their rally point. The school had been telling staff members this for 10 years.

Unfortunately, the Meijer's grocery store, this was a handshake deal. There was no emergency planning before the event. When these thousand people begin to show up at this Meijer's grocery store, the manager of the Meijer's grocery store has no idea that he's the rally point.

Obviously, over 10 years, a handshake deal changes, staff change, things like that. Luckily, the manager at the Meijer's grocery store realized what was happening and he put it into effect that they were going to evacuate the people that were inside the store shopping and bring all the students and staff in the building to keep them safe.

The other piece that was missed in the emergency planning piece is that law enforcement did not know that the Meijer's grocery store was going to be the rally and reunification site for the notification center.

It was a half hour before a commander was even sent to be a liaison with the actual command and control system for the incident to that site because it was unprepared.

That caused a lot of problems in the reunification piece. It caused people to come there to only later find out that – and we've had this happen in almost every incident since Sandy Hook, where parents are standing around waiting outside to be unified with their students only to find out that they've been wounded or killed.

That plan wasn't good enough and set up well in the emergency planning to actually say, "Hey, this is what we need to do. These are the people we need to have in place. These are the people that need to come here to set up."

It wasn't set up for community resources. It wasn't set up for initial mental health resources. It wasn't set up for initial victim's assistance. All of those things fell apart. Like we talked about on that first question, there was an emergency plan, but the emergency planning piece wasn't done.

One of the other big pieces that happened is in the aftermath of the event, and for whatever reason, the sheriff's department that was in charge of the incident rejected the FBI's evidence processing team to evidence-process the crime scene.

The sheriff's department did it internally, but when the FBI comes in and does those types of crime scenes, the FBI also bags and tags all the personal property that's left behind. They help return it. They help set up cleaning of the scene from blood and debris.

Because the sheriff's office processed the scene, that wasn't done, and it required the school staff to actually come in and do the cleaning in the aftermath of the event, which the staff members described as horrific.

That's a piece of the emergency planning piece that needs done way in the front. That's not a decision that you want to be making in the aftermath. To identify all of those things, there's templates out there to use.

For this particular incident, the NFPA 3000 template would have been extremely helpful in the planning phase that, "Here's what we need to have for emergency planning. Here's what we need to do for preparation, the response, and the recovery to the event."

It makes things, while not perfect for the community, it makes that recovery very simple because it's spelled out, and it helps everyone recover faster from the event.

**John:** Joe, how do you identify who you need to work with on an emergency planning team?

**Joe:** That's an excellent question, John. One of the things that really needs to be taken into account is who are all of your stakeholders? If we look at a huge emergency operation plan, like at a county level, who are all the stakeholders in a county that need to be in our emergency operation plan?

That could be every law enforcement agency in a county and an emergency manager at a county level, the fire departments, the emergency operations, but it also includes school districts. It includes sometimes individual or private schools.

It includes businesses. It includes agencies that you may not think of, like who picks up the garbage because those trucks can be utilized to block roads to prevent traffic and looky-loos from coming into an area that needs to be under the control of law enforcement or especially for large crime scenes. All of those people need to be involved in that.

When you're talking about a school, the school really needs to sit down and instead of thinking about, "We need to check this box to say that we did it," it is, "Who do we need to have in the room before we check the box?"

For a school, obviously, you have your administration. If you have security directors, your maintenance people, your custodial people, representatives from your teaching staff. It could be substitute teachers, student representation, parent representation. Who are your food service providers becomes important.

What vendors do you have if you have a water leak, if you have a fire? Who's coming to put your building back together? All of those people need to be in the room.

While one person may be in charge and a small group of people may be making the decisions for that emergency operation plan, everyone should have some type of input to that plan and know what's being discussed and know what their role is. [coughs] Excuse me, John.

All of your stakeholders need to be in the room. That may be 20 to 30 people in the emergency planning phase. It may be only a few people that once you get all that input that are sitting down and writing that emergency operation plan, but the one thing a lot of people don't think about is your emergency operation plan is specific to your school or your district.

While it's OK to utilize a template that maybe comes from the state or from the federal government, that template needs to be broken down small picture to you. That makes it extremely important to have all those people in the room.

If you have, like we talked about earlier, there's a train line that runs through your school district that carries chemicals and that is one of the risks that you face, then maybe someone from the company that operates the trains on the track needs to be in your meeting.

Those people could change. It could be behavioral threat assessment team personnel that you use from outside the school, local psychologists, mental health professionals, victims' assistance. Those people may need to be on your teams for emergency operation plan.

Many times, they're not even thought of because we don't have resources or our resources don't think about it. It's not focused on getting everybody in the room. It's more focused on checking that box.

Sometimes we get involved as school security experts. Sometimes schools contact us and actually have us in the room for these meetings so we can guide them along, like where does this need to go? What are we not addressing?

Just sit in the room and be a resource for people to ask questions of, like what is the expertise that we can provide to you on a level for your particular risks, and what are those risks? Many times, people overestimate some risks because most people think active shooter, and that is always tied into injuries and death.

What they don't sometimes look at is the most dangerous time at a school is when kids are being dropped off in the morning or picked up in the afternoon. That's when we see the most injuries in students and deaths, not only of people and students, but of people who are even directing traffic.

Law enforcement officers have been killed during pickup and drop off. It's a very dangerous time if it's not done correctly. Many times, everyone's thinking about the big incident when it's the small one that's probably going to catch them with their pants down and something happens and they're not prepared.

That is extremely important to have all of those people on that team to look at everything.

**John:** Joe, how do you test your emergency plan to determine if your emergency planning was successful?

**Joe:** There's a couple of different ways to do this. One of the things is in training, and training's really important, a lot of people don't train but they run drills. If you don't train, the drills have a tendency not to be successful.

What happens is if you're going to have – let's pick an incident here. We'll go basic fire drill. We train people at a very young age in fire response. We train the basic things like stop, drop, and roll. We train the basic things like evacuation, how to pull fire alarms when students get older, and staff.

We teach them how to use fire extinguishers probably around that junior high age. That is when all that training is done. The drill is then utilized to test to make sure the training is correct.

When I went to school, I got to be a line leader a couple of times in fire drills as a very young student because the teacher's position is not to be in the front of the line during a fire drill. The teacher's position is to be at the rear of the line to make sure all of the students got out of the room.

Literally, we're placing our lives in a fire drill because of basically who's in the building and who can respond in the hands of maybe an eight-year-old student who knows the route to get out of the building and knows that if they can't go that way, to notify someone behind them that the line needs to turn around and go out to a secondary exit to get out of the building.

The teacher's responsibility is to keep all of the students together and make sure that everyone got out of that room. We're training everyone on a particular level to respond to a fire.

If that doesn't go well, if the person in the front of the line goes the wrong way or the teacher doesn't pay attention and get everybody out of the room and when they're clearing the building, when everyone's outside, they find a student, those are the parts of the drill that's telling us we did something wrong.

Either the wrong person is leading us, the teacher doesn't understand how to do things. One of the things the teacher's supposed to do is close the door, if they don't close the door. All these basic things. Maybe the secondary evacuation route didn't work correctly or the students didn't understand how to turn around.

We go back and retrain that piece, so in the next drill, we can do it correctly because that's when you want to make a mistake. Not when there's an actual fire inside the building. That's how we determine our emergency operation plan is working correctly.

Other things that we do with administrators and staff is conduct tabletops. Here's the location, here's the administrative team that's going to be responding to this. Who's in charge of communication? Who's in charge of making announcement?

Who's in charge of gathering all the staff and students together and taking attendance in the aftermath of an event to make sure everyone's here. Who's doing reunification with students? Who's being the liaison with law enforcement during a critical incident? Who's being the liaison with fire during a critical incident?

How are we tracking students, and what transport may be to hospitals during a mass casualty accident from a traffic crash or a bus crash? How are all those things working?

It's testing them in a tabletop exercise to make sure those staff members know what their particular job is, who they're supposed to contact, who they're in direct contact with, how information is passed, what communication systems are being utilized. All of that needs to be done.

If those drills go correctly, excellent. If they don't go correctly, that's when we need to address what we need to do to be successful in that emergency operation plan. Maybe communications were spotty. Maybe someone didn't get contacted.

Maybe there's a lack of communication from administrators to the joint information center, the people that are putting out the information. Maybe something gets messed up and the wrong message is sent out. That's when you want to find that out, in a training exercise, or in a drill, or in a tabletop.

Those are the places where you want to make mistakes. That's where we know we can tweak things to make a plan successful. It's not waiting till the incident happens. That's not when you want to find out whether your plan is successful or not.

**John:** Joe, one final question today. Why do emergency plans fail?

**Joe:** I think the big reason from post-incident analysis of many of these is that initially, while the school has an emergency operation plan, they didn't have the community involved in it. It's one or two people writing an emergency operation plan, utilizing a template, maybe walking around doing a self-assessment.

What they don't do very well – and this is one of the things that we work with schools on because no one sets out as an educational facility to have their emergency operation plan fail, but there's also a level of expertise that needs to be utilized for these. Sometimes schools don't have that.

Reaching out to local law enforcement is one way to assist, and that's if they have someone on their staff that's able to do this. Reaching out to third-party providers is another way to do it, but it's getting that assistance and that buy-in from the community as a whole to know what that emergency operation plan is.

You may have a pizza delivery place that needs to be part of your emergency operation plan because if you evacuate your school and go to a site, a notification center, and you have to do the reunification, and that takes three or four hours, how are we getting water to the students and staff?

How are we getting food to the students and staff, especially for processes that take hours? Those are people that sometimes aren't thought about in emergency operation plans because that expertise and what that knowledge is of what goes on at those centers in the aftermath of an event isn't generally known or prepared for.

We look at it as if we've checked the box that we have the plan, but what we haven't done is the emergency planning piece that includes having a pizza delivery service come in and give us food.

That's one of the reasons the plans fail. They're not practiced. They're only on paper. They haven't been tested in a tabletop exercise. Their communication systems aren't regularly checked inside buildings. There's dead spots in a building for a PA system that people don't get the message when there is an emergency.

When I worked at Kent State, we had an incident where we sent out a text message for a critical incident. One carrier, the people that had a particular carrier got the message right away. Another carrier got the message the next morning at 7:30, almost 12 hours later.

That was something that luckily didn't affect our response as a whole at the university, but the company that we were working with at the time, because they were quickly relieved of duty after that occurred, they had told us that everyone, regardless of the carrier, would get the message that was sent out.

We found out in real time that that's not what occurred. It made us test our systems monthly. Some people only test their systems yearly. We went to a monthly test. Then that monthly test also became daily tests across the campus at certain locations to make sure those communication systems were working through PA systems.

Were text messages being sent out? Could people hear PA announcements in buildings, outside of buildings? That was a plan failure that luckily didn't come back and hurt us, but it easily could have. Schools need to think about that.

We make an announcement, can the announcement be heard outside? Can the announcement be heard inside a building? Does our text message system work? How does that operate? How do we know where we're supposed to meet with emergency?

When there's a critical incident at a facility, where are the command centers going to be set up? Who is going to that command center? Do they have things like NIMS training and ICS training, incident command training and National Incident Management System?

Do they have that training so when they get to that location and they're talking to law enforcement, and fire, and EMS directors, to give information about their building, or their people, or where they believe someone may be hiding inside the building? Is that information being passed properly, and are they all talking the same language?

Those are the reasons that emergency plans fail because we look at big picture sometimes or we look like we've checked the boxes, but we don't look at the little picture and how things work together.

**John:** Joe, thanks so much for joining us again today.

**Joe:** Hey. Thank you, John. I really appreciate you having me back.

**John:** You just listened to Joe Hendry from qualified member expert service provider, [Cosecure Enterprise Risk Solutions](#).

Special thanks to today's producer, Frank Vowinkel.

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I'm John Czuba, and now this message.

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