| **Exercise Planning Tasks** | **Responsible Party** | **Contact Information** | **Suggested Timeline** | **Date Completed** | **Remarks** |
| --- | --- | --- | --- | --- | --- |
| 1. **Design and Development** |  |  |  |  |  |
| **Foundation** |  |  |  |  |  |
| Review exercise program guidance, including:   * Elected and appointed officials’ intent and guidance * Multi-year Training and Exercise Plan (TEP) * Existing plans and procedures * Risk, threat, and hazard assessments * Relevant AARs/IPs * Grant or cooperative agreement requirements | [Exercise Program Manager] |  | [Prior to design of exercise concepts and objectives. 6-8 months before exercise] |  |  |
| **Exercise Planning Team and Events** |  |  |  |  |  |
| Identify elected and appointed officials and representatives from the sponsor organization for potential Exercise Planning Team membership |  |  | [5-7 months before exercise] |  |  |
| Identify participating organizations for potential Exercise Planning Team membership |  |  | [5-7 months before exercise] |  |  |
| Officially stand up Exercise Planning Team with Exercise Planning Team Leader and section chiefs, as appropriate |  |  | [5-7 months before exercise] |  |  |
| Develop exercise budget |  |  | [5-7 months before exercise] |  |  |
| Schedule first planning meeting (C&O or IPM as needed) |  |  | [5-7 months before exercise] |  |  |
| Identify/review topics or issues to be covered during the first planning meeting (C&O or IPM as needed) |  |  | [3-4 weeks before C&O Meeting or IPM] |  |  |
| **Planning Meetings** |  |  |  |  |  |
| **Concepts and Objectives (C&O) Meeting (optional)** |  |  | [Prior to or concurrent with IPM. 5-7 months before exercise] |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before C&O Meeting] |  |  |
| Develop draft exercise scope, objectives, and aligned core capabilities |  |  | During C&O |  |  | |
| Identify/confirm exercise planning team |  |  | During C&O |  |  | |
| Develop and distribute meeting minutes |  |  | [No later than (NLT) 1 week after C&O Meeting] |  |  | |
| **Initial Planning Meeting (IPM)** |  |  | [5-7 months before exercise] |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before IPM] |  |  |
| Identify exercise design and development elements and begin development of exercise documentation   * Scope, objectives, and core capabilities * Evaluation requirements (capability targets and critical tasks) * Scenario threat/hazard * Participants and extent of play * Exercise staffing requirements * Exercise logistics (date, location, including breakout locations or specific exercise play sites, if needed) |  |  | During IPM |  |  |
| Assign responsibilities and due dates for tasks and determine date for next planning meeting |  |  | During IPM |  |  |
| Develop and distribute meeting minutes |  |  | [NLT 1 week after IPM] |  |  |
| **Midterm Planning Meeting (MPM) (as needed)** |  |  | [3 months before exercise] |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before MPM] |  |  |
| Review and refine all exercise materials, documents, and tasks |  |  | During MPM |  |  |
| Assign responsibilities and due dates for tasks, and determine date for next planning conference |  |  | During MPM |  |  |
| Develop and distribute meeting minutes |  |  | [NLT 1 week after MPM] |  |  |
| **MSEL Meeting (if necessary)** |  |  | [2 months before exercise] |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before MSEL Meeting] |  |  |
| Review and develop MSEL injects |  |  | During MSEL Meeting |  |  |
| **Final Planning Meeting (FPM)** |  |  | [6 weeks before exercise] |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before exercise] |  |  |
| Facilitate meeting |  |  | During FPM |  |  |
| Review and approve all exercise documents |  |  | During FPM |  |  |
| Finalize exercise staffing (including facilitators/controllers, evaluators, and support staff) |  |  | During FPM |  |  |
| Confirm all exercise logistical elements (including exercise site(s), equipment, and schedule) |  |  | During FPM |  |  |
| Assign responsibilities and due dates for tasks |  |  | During FPM |  |  |
| Develop and distribute meeting minutes |  |  | [NLT 1 week after FPM] |  |  |
| **Documentation** |  |  |  |  |  |
| Develop Situation Manual (SitMan) or Exercise Plan (ExPlan) |  |  |  |  |  |
| Develop Facilitator’s Guide or C/E Handbook |  |  |  |  |  |
| Develop exercise evaluation packets (including Exercise Evaluation Guides [EEGs]) |  |  |  |  |  |
| Develop multimedia exercise presentation |  |  |  |  |  |
| Develop MSEL (as needed) |  |  |  |  |  |
| Develop Participant Feedback Forms |  |  |  |  |  |
| **Exercise Site Areas** |  |  |  |  |  |
| Designate media/observer area |  |  |  |  |  |
| Designate registration area |  |  |  |  |  |
| Designate parking area |  |  |  |  |  |
| **Media/Public Information** |  |  |  |  |  |
| Develop media policy |  |  |  |  |  |
| Develop Press Release and/or Public Announcements as needed |  |  |  |  |  |
| **Logistics** |  |  |  |  |  |
| Identify exercise venue |  |  |  |  |  |
| Arrange for use of exercise venue (reserve room/use of facility) |  |  |  |  |  |
| Arrange for participant parking at venue |  |  |  |  |  |
| Arrange for audio/visual equipment (e.g., microphones, screens, projectors) |  |  |  |  |  |
| Arrange for exercise supplies (e.g., pens, markers, flipcharts) |  |  |  |  |  |
| Develop mailing lists (players, facilitators, Exercise Planning Team) |  |  |  |  |  |
| Develop ID badges, name/table tents, and sign-in sheets |  |  |  |  |  |
| Arrange for restrooms |  |  |  |  |  |
| Develop signage |  |  |  |  |  |
| **Exercise Staffing** |  |  |  |  |  |
| Determine exercise staff requirements |  |  |  |  |  |
| Select and train exercise staff |  |  |  |  |  |
| 1. **Conduct** |  |  |  |  |  |
| **Exercise Play Preparation** |  |  |  |  |  |
| Distribute exercise documentation |  |  | [1 week before exercise] |  |  |
| Set up exercise site(s) (including Simulation and/or Control Cells, as needed) |  |  | [1 day before exercise] |  |  |
| Present pre-exercise Elected and Appointed Official Briefing (as needed) |  |  | As requested |  |  |
| Conduct pre-exercise briefings:   * C/E Briefing and/or Evaluator Training * Actor Briefing (as needed) * Player Briefing * Observer Briefing (as needed) |  |  | [NLT 1 day before exercise (C/E Briefing), or before STARTEX] |  |  |
| **Exercise Conduct** |  |  |  |  |  |
| Facilitate/Control exercise play |  |  | During Exercise |  |  |
| Collect data |  |  | During Exercise |  |  |
| **Wrap-Up Activities** |  |  |  |  |  |
| Conduct post-exercise player Hot Wash |  |  | Immediately following ENDEX |  |  |
| Conduct C/E Debrief |  |  | Immediately following ENDEX and Hot Wash |  |  |
| 1. **Evaluation** |  |  |  |  |  |
| **After-Action Report (AAR)** |  |  |  |  |  |
| Complete and submit all EEGs |  |  | Immediately following exercise |  |  |
| Develop draft AAR |  |  | [NLT 30 days after exercise] |  |  |
| Distribute draft AAR to participating organizations’ policy and decision makers for review |  |  | [NLT 30 days after exercise] |  |  |
| 1. **Improvement Planning** |  |  |  |  |  |
| **After-Action Meeting** |  |  |  |  |  |
| Schedule meeting |  |  | Immediately following exercise |  |  |
| Coordinate meeting logistics, prepare and send invitations and read-ahead packets |  |  | [2-3 weeks before AAM ] |  |  |
| Receive feedback on Draft AAR, make any revisions, and develop draft list of corrective actions |  |  | [1 week before AAM] |  |  |
| Conduct AAM to reach consensus on AAR content and revise/gain consensus on corrective actions |  |  | [NLT than 45 days after exercise] |  |  |
| Finalize AAR/IP |  |  | [NLT 1 week after AAM] |  |  |
| Distribute final AAR/IP |  |  | [NLT 1 week after AAM] |  |  |
| **Continuous Improvement** |  |  |  |  |  |
| Share lessons learned, best practices, and successes identified in AAR/IP |  |  | Ongoing |  |  |
| Implement corrective actions |  |  | Ongoing |  |  |
| Track AAR/IP implementation |  |  | Ongoing |  |  |