



EXERCISE PLANNING MEETINGS

EXERCISE PLANNING CONFERENCES

- Concept and Objectives Meeting (C&O)
- Initial Planning Conference (IPC)
- Master Scenario Events List Conference (MSEL)
- Final Planning Conference (FPC)

CONCEPT & OBJECTIVES MEETING

- Formal beginning of the planning process
- Held to identify:
 - Exercise type
 - Scope
 - Objectives
 - Purpose
 - The C&O Meeting is typically attended by representatives of the sponsoring agency, the Lead Exercise Planner, and carefully selected senior officials.
- For less complex exercises and for jurisdictions with limited resources, the C&O Meeting can be conducted in conjunction with the IPC

INITIAL PLANNING CONFERENCE

- Lays the foundation for exercise development
- Purpose:
 - Gain concurrence from the exercise planning team on scope, design requirements, and conditions
 - To determine objectives, levels of participation, and scenario variables from each participating agency

IPC DISCUSSION POINTS

- Ensuring objectives are clearly defined and measurable
- Incorporation of the following:
 - Community emergency operating plan (EOP) and/or relevant agency standard operating procedures (SOP)
 - Identifying local issues, concerns, or sensitivities
 - A “teamwork” approach
- Exercise design teams
- Developing a planning schedule

PRIOR TO THE IPC

- Send out read-ahead packet (C&O paper)
- Provide agenda
- Develop a briefing to present an overview of the exercise to the planning team:
 - Purpose
 - Goals
 - Objective
 - Narrative

IPC EXPECTED OUTCOMES

- Clearly defined, obtainable, and measurable objectives
- Exercise narrative
- Identify major events
- Identify scenario variables (e.g. threat scenario, number of casualties, venue)
- Ensure appropriate agencies are participating
- Identifying and recruiting SMEs and facilitators

IPC EXPECTED OUTCOMES

- Assigning responsibility for exercise document development and presentations/briefings
- Acquiring all source documents (e.g., policies, plans, procedures) needed to draft exercise documents and presentations
- Identifying and assigning responsibility for logistical issues (e.g., registration, badges, invitations)
- Establishing dates for completion of action items and tasks
- Developing a planning schedule
- Identifying critical tasks for the next planning conference
- Determining date, time, and location of the next conference and the actual exercise

IPC FOLLOW-UP

- IPC minutes should be prepared and disseminated among planning team members within 4 working days of conference conclusion
- Direct and continual contact should occur among all members of the exercise planning team regarding outstanding information and the logistics for conducting additional planning conferences and the exercise itself

MASTER SCENARIO EVENTS LIST

- Master Scenario Events List Conferences (MSELs) typically are used in both discussion and operations-based exercises and allow planners to develop a chronological listing of the events and injects that drive exercise play
- The MSEL links simulation to action, enhances exercise experience for players, and reflects an incident or activity that will prompt players to implement the policy or procedure being tested

FINAL PLANNING CONFERENCE

- The FPC provides the final forum for reviewing exercise processes and procedures
 - The planning team will receive final drafts of all exercise materials prior to the FPC
 - No major changes to the design or scope of the exercise or its supporting documentation should take place at the FPC
- The FPC ensures that all logistical requirements have been arranged, all outstanding issues have been identified and resolved, and all exercise products are ready for printing

FINAL PLANNING CONFERENCE

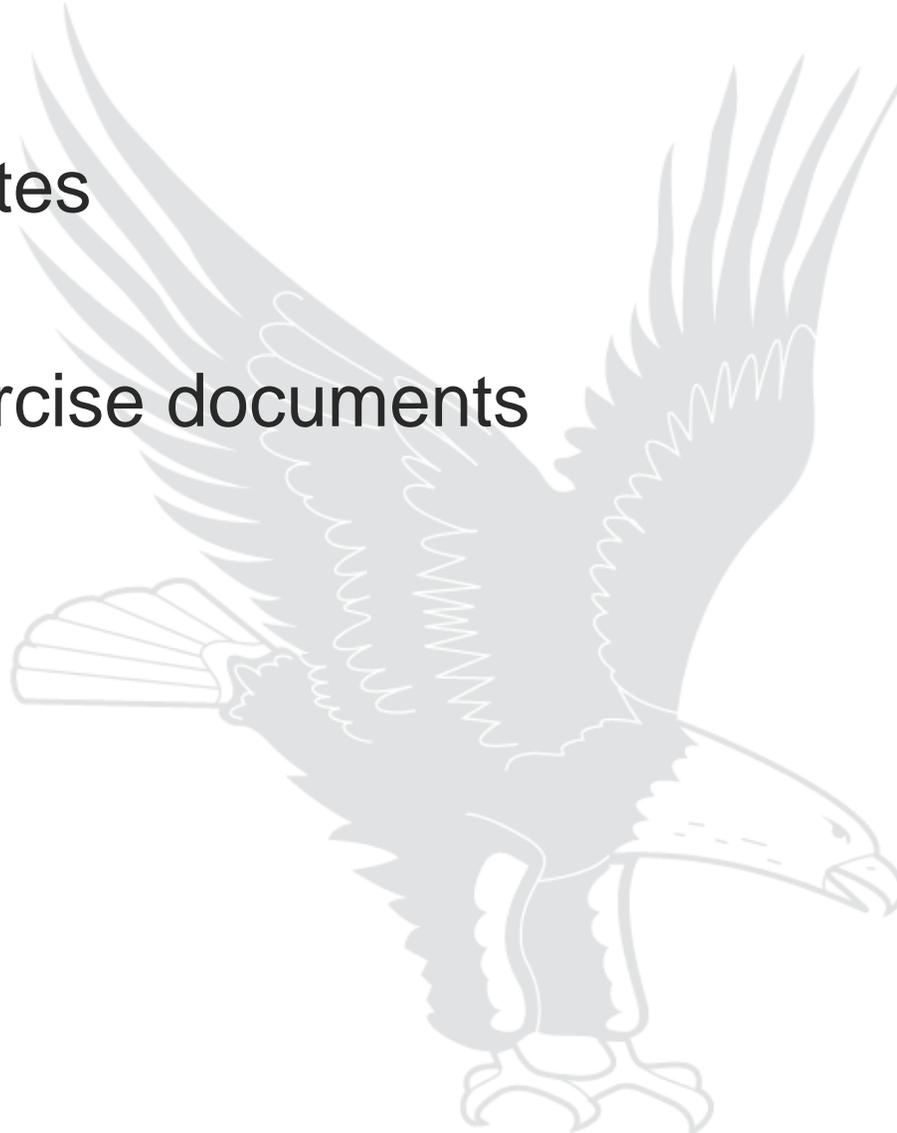
- Generally, the FPC is a half-day conference for discussion-based exercises and a full day for operations-based exercises
- The FPC should be located in close proximity to the planned exercise site to allow a final site walkthrough
 - The facility should be conducive to discussion and accomplishment of work-related tasks

FPC POINTS TO STRESS

- Resolve any open issues related to exercise planning and identify last-minute concerns that may arise
- Review all exercise logistical tasks (e.g., schedule, registration, attire, special needs)
- Conduct a comprehensive final review of and approve all exercise documents and presentation materials

FPC TOOLS

- IPC minutes
- Agenda
- Draft exercise documents



FPC EXPECTED OUTCOMES

- The FPC should not generate any significant changes or surprises
- Finalization of all exercise documents/multimedia presentations, and coordination of other support requirements
- Clear understanding and final approval of exercise processes and procedures
- Approval of exercise documents and materials for production
- Identification and resolution of last-minute issues
- Confirmation on logistical elements including A/V equipment, room configuration and setup, refreshments, and schedule

FPC FOLLOW-UP

- FPC minutes should be prepared and disseminated among exercise planning team members within 4 working days of conference conclusion
- There should be direct contact among exercise planning team members regarding any outstanding issues, especially issues related to the logistics for conducting the exercise
- The planning team should finalize all publications, prepare all supporting materials, rehearse presentations and briefings, and prepare to conduct the exercise
- Prior to the exercise, information and documentation should be disseminated to appropriate personnel (e.g., presenters, facilitators, controllers, evaluators, simulators)

QUESTIONS

