Use this checklist to prepare, develop, and evaluate a drill. Adapt and customize it to meet the needs of your organization.

*The level of detail in this document may be better suited for large organizations. Refer to the Quick Drills for easy to follow, scenario specific tabletop drills.*

| **Task** | **Action Items** | **Status** |
| --- | --- | --- |
| Review exi*s*ting documentation | Existing documentation can help you identify vulnerabilities and/or specific areas of your plan that would benefit from enhancement, review, or training.   * **Review the Hazard Vulnerability Assessment.** Consider developing a drill that will exercise the scenarios that are most likely to occur and/or have the potential to be highly disruptive. * **Review existing drill or exercise history documentation.** Consider a drill that exercises any areas that were identified for improvement. * **Review existing emergency plans.** Drills are a good time to test policies or procedures that are only used in the event of a disaster – for example, notification procedures or manual workaround for critical processes. |  |
| Type of drill or exercise | Consider the size of the organization, available resources, internal support and the purpose when identifying the type of drill or exercise to be conducted.   * **Walkthrough.** A walkthrough familiarizes members of your organization with their roles and responsibilities, as described in emergency response and business continuity plans. These are ideal for new members of your team. * **Tabletop Drill/Exercise.** A discussion-based session in which members of your organization come together and discuss what actions they would take in the event of a particular disruption or disaster. * **Functional Exercise.** Members of a particular team perform their duties in a simulated environment. Functional exercises are scenario based and designed to validate the plans and readiness of specific teams or functions.   You are encouraged to conduct a tabletop drill on an annual basis to ensure members of your organization know how to respond in the event of a disaster. |  |
| Schedule and Conduct Planning meetings | A planning meeting should include representation from all areas of the organization and, whenever possible, stakeholders with policy and procedure influence and decision making authority.  **Initial Meeting**   * Identify participants for the drill/exercise * Identify a date, suitable location, and duration for the drill/exercise * Develop drill/exercise objectives * Identify a disruption or disaster scenario   **Scenario Development Meeting(s)**   * Local newspapers can provide real life examples or inspiration for developing scenarios. You can also revisit an incident that actually occurred. * **Initial inject**. Provide time and type of incident – for example, fire, explosion, earthquake. Describe immediate impacts to people, operations or services, as well as the availability and engagement of resources. * **Additional injects.** Provide more information on the situation and pose challenging problems as the scenario develops – lack of resources, additional complexities like loss of power or medical emergencies. * **Discussion questions.** Develop a list of key discussion questions for the scenario – things you feel should be considered or that you want to ensure are not overlooked. These discussion questions are a good way to provide additional training and reinforcement.   Depending on the type of drill, your scenario can be as simple as a handwritten notes used to guide a discussion or as elaborate as a presentation with video. Slideshow images can be very effective in helping the audience visualize the impact.  **Final Meeting**   * **Finalize documentation.** * **Finalize participants and supporting staff.** At a minimum, you are encouraged to have a dedicated scribe, someone responsible for documenting decisions, actions, and key discussions. * **Finalize Logistics.** Confirm location, supplies, and refreshment needs. |  |
| Logistics | * **Location.** If necessary, reserve a room for the drill. * **Meeting invites.** Send meeting invitations to participants well in advance of the drill date. Be sure to include location, duration, objectives and note any requirements and expectations. * **Supplies.** Procure and/or reserve supplies such as charts, pens, printouts and materials and refreshments. Reserve any additional supplies and submit requests where necessary for projector, screen and location set-up. * **Supplies for function drills.** Ensure access to alternate locations, and any special supplies, equipment, or documentation. * **Drill/exercise materials.** Prepare any required documentation, presentations, printouts, or copies. |  |
| Conducting the drill | Each drill will have the following components:   * **Set up.** Ensure the room is set up and that you have necessary materials. * **Briefing.** Review the agenda, ground rules, and objectives. * **Introduce the scenario.** This sets the stage for discussion and decision-making and may be handled by a facilitator or by the response team leader. * **Discuss or perform response activities.** Action during this, the response phase, of the drill will vary depending on the type of drill/exercise you are conducting. * **Debrief.** Conduct a debrief as soon as possible to identify areas of improvement and action items, such as revisions to plans, procedures, or roles. |  |
| Evaluation and After Action Reporting | **Complete an** [**After Action Report (AAR)**](http://www.readyrating.org/Resource-Center/Emergency-Planning/after-action-report-sample?utm_source=AnonOnPageLink&utm_medium=Link&utm_term=AnonUser&utm_content=ResourceLinks&utm_campaign=AnonOnPageLink)**.** The AAR serves as formal documentation of your drill/exercise and should contain the following:   * Date and time of drill * Participants * Goals/objectives * Description of the event and timeline * Lessons learned * Action items |  |