



DHSEM Exercise Planning Checklist



The intent of this checklist is to assist your exercise planning team in meeting milestones in accordance with HSEEP and DHSEM Training and Exercise Unit guidelines. This checklist is not a standard DHS HSEEP template, but rather an aid produced by DHSEM.

CONCEPT & OBJECTIVES MEETING (C&O):

- Agreement regarding exercise type, scenario, capabilities, tasks, and objectives.
- Consensus regarding the target exercise timeframe and the date and time of the next planning conference.
- Identification of participating entities.

INITIAL PLANNING MEETING (IPM):

- A planning schedule
- Clearly defined, obtainable, and measurable capabilities, tasks, and objectives
- Identified exercise scenario variables (e.g., threat scenario, scope of hazard, venue, conditions)
- A list of exercise participants
- Identification and availability of SMEs and presenters, as necessary, for scenario vetting and/or expert evaluation
- Determination of the best communication method among exercise planning team members
- A list of which exercise documents and presentations must be employed, and assignments for drafting each
- Availability of all source documents (e.g., policies, plans, procedures) needed to draft exercise documents and presentations
- Clearly identified and assigned responsibility for exercise logistical issues (e.g., registration, badges, invitations)
- A list of established dates for completion of corrective actions and responsibilities
- A list of critical activities for the next planning conference
- An agreed upon date, time, and location for the next conference and the actual exercise

MID-TERM PLANNING MEETING (MPM):

- Agreement on final ExPlan details
- A fully reviewed exercise scenario timeline, usually the MSEL
- Fully reviewed exercise documentation (e.g., ExPlan, C/E Handbook)
- Well-developed scenario injects (imperative if no additional conferences are scheduled)
- Agreement on the exercise site
- Finalization of date, time, and location of the FPM



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MASTER SCENARIO EVENTS LIST (MSEL) PLANNING MEETING:

- Key events and the time of their delivery are identified.
- Responsibility for constructing the remaining events is assigned.

FINAL PLANNING MEETING (FPM):

- Attendees have a clear understanding of—and give final approval for—exercise processes and procedures.
- Exercise documents and materials for production are approved.
- Last-minute issues are identified and resolved.
- Logistical elements, including A/V equipment, room configuration and setup, refreshments, and schedule, are confirmed.