

Exercise Planning Tasks	Responsible Party	Contact Information	Suggested Timeline	Date Completed	Remarks
I. Design and Development					
Foundation					
Review exercise program guidance, including: <ul style="list-style-type: none"> • 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]		

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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]		

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Identify exercise design and development elements and begin development of exercise documentation <ul style="list-style-type: none"> • 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		

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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]		

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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					

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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					
II. 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		

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Conduct pre-exercise briefings: <ul style="list-style-type: none"> • 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		
III. 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]		
IV. Improvement Planning					
After-Action Meeting					
Schedule meeting			Immediately following exercise		

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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		