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 Drill Hub in the Ready Rating Resource Center for easy-to-follow, scenario-specific tabletop drills.

| **Task** | **Action Items** | **Status** |
| --- | --- | --- |
| Review existing 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 test 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 tests 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 workarounds 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 the time and type of incident – for example, fire, explosion, snowstorm. Describe immediate impacts on 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 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 personnel.** 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, and objectives, and note any requirements and expectations. * **Supplies.** Procure and/or reserve supplies such as charts, pens, printouts, materials, and refreshments. Reserve any additional supplies and submit requests where necessary for a 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 the 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 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).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 |  |