A disorganized sheltering-in-place process can result in confusion and injury. This checklist, appropriate for any type of organization, will help you prepare for, conduct, and evaluate your next sheltering-in-place drill.

**PREPARATION**

* Review your Emergency Action Plan and ensure it has:
* Identified conditions under which sheltering-in-place would be necessary; be sure to identify conditions which would require everyone to shelter in their immediate location as opposed to a predetermined assembly area.
* Written sheltering procedures.
* Identified a clear chain of command and designated those authorized to order sheltering-in-place or a facility shutdown.
* Identified personnel with special and/or functional needs who may need assistance sheltering-in-place and one or more people assigned, including backup personnel, to assist them during an emergency.
  + Organizational leaders are encouraged to educate themselves on best practice compliance and realistic accommodations for accessibility needs.
* Procedures for assisting personnel and visitors, particularly those who do not speak the dominant language.
* Identified systems to notify and account for building occupants during off-hours.
* Identified key personnel to perform critical shutdown operations or other duties before sheltering in place.
* Procedures to account for personnel during a sheltering-in-place situation.
* Recommended types and amounts of safety and first aid equipment to have on-site.
* Ensure procedures, shelters, and routes are marked on floor plans that are posted throughout the facility.
* Ensure shelter and assembly areas are well-marked.
* Ensure routes were chosen to protect personnel, visitors, and contractors from additional hazards and that they will not hinder emergency response efforts.
* On an annual basis, at a minimum:
* Inspect all routes to ensure they are free of obstructions and debris
* Test all backup and safety systems such as emergency lighting and communications systems
* Provide emergency response training to safety wardens and personnel
* Conduct a sheltering-in-place drill

**CONDUCTING THE DRILL**

* When conducting drills for a site with multiple buildings, do them one building at a time.
* If you are going to set off any alarms during your drill, be sure to contact emergency services or other relevant agencies beforehand to let them know when and where you'll be conducting the drill to avoid any accidental activations.
* If you are in a multi-tenant building, be sure to notify other occupants in advance that you will be conducting a drill.
* If your facility has unique hazards or requires special access procedures for first responders, you may wish to periodically include them in your drills.
* Consider the current weather – unless you are testing procedures relevant to a particular weather event, avoid potential hazards by conducting your drill during temperate conditions.
* Assign observers.
* Give prior notice that you are conducting a practice drill – this can be an announcement at the time of the drill such as, “We are conducting a shelter-in-place drill. Please move to your assigned shelter location immediately.”
* Establish a scenario in which a primary shelter-in-place location is unavailable so occupants must go to a secondary or alternate location.

**MONITORING AND OBSERVING THE DRILL**

* Record the date, start time, end time, and name of the individual in charge.
* Check only those items that were observed or demonstrated during the drill:
* Notification systems, alarms, and communication tools functioned as expected
* Individuals with assigned roles and responsibilities practiced their skills
* Procedures for wheelchairs or other mobility devices were tested
* Safety equipment was located and tested
* Personnel, visitors, and contractors used the designated routes and sheltered in the designated areas
* Personnel, visitors, and contractors carried out procedures appropriate for the situation
* Accountability procedures were practiced
* Pay attention to any of the following:
* Communication difficulties
* Issues with any of the exits, fire doors, or routes
* Difficulties for any occupants, particularly children or those with special and/or functional needs
* Inappropriate or unnecessary actions such as gathering personal items, using elevators, or locking doors

**FOLLOW UP ACTIVITIES**

* The Emergency Response Team and any observers should conduct a debrief to share observations and identify gaps and/or opportunities for improvement.
* Document the drill and keep the records for at least two years – you may wish to use the Drill/Exercise History Form or the After-Action Report.