# Checklist for Outdoor exercise

## Analysis Phase

| TASK | CHECK[[1]](#footnote-1) | Comments | Date |
| --- | --- | --- | --- |
| Identify **training needs** |  |  |  |
| Identify **target group** |  |  |  |
| Set **Overall Aim** |  |  |  |
| Analysis of **reference documentation**. |  |  |  |
| **Review** documentation from former or similar actions (including lessons learnt) |  |  |  |
| Set **responsible for design phase** |  |  |  |
| Identify the **type of training** that will be developed (seminar, workshop or exercise) |  |  |  |
| **Indoor or outdoor** training |  |  |  |
| Determine if it will be required to **deploy specific resources** (vehicles, marine pollution combat resources, communication resources, technical resources, simulators, models, etc.) |  |  |  |

*Suggestion: It is recommended that analysis meetings be held with the frequency and periodicity that are necessary to complete the tasks of this phase.*

## Design phase:

| TASK | CHECK | Comments | Date |
| --- | --- | --- | --- |
| Consider **topics covered and lessons learnt** from former actions |  |  |  |
| Set general **objectives** |  |  |  |
| Establish exercise **scope** |  |  |  |
| Establish the **working team** for the design phase. **Roles** and **responsibilities** |  |  |  |
| **Establish the plan to be developed:** | | |  |
| Exercise Type |  |  |  |
| **Participant Organizations** (groups, departments) and roles |  |  |  |
| **Number of participants** (trainees) |  |  |  |
| Duration |  |  |  |
| Date/s |  |  |  |
| Location/s |  |  |  |
| Budget (financial issues) |  |  |  |
| Other parameters |  |  |  |
| Take into consideration the **reuse of materials** from former or similar actions. |  |  |  |
| ***Ac*tion plan:** | | |  |
| **Schedule** (Actions for the following phases including meetings and deadlines) |  |  |  |
| **Operational communications plan** (both for participants and staff) |  |  |  |
| **Monitoring and evaluation** **plan** (learning and process assessment) |  |  |  |
| **Resources**: | |  |  |
| Identification of **Means** to be deployed.  i.e.: vehicles (air, sea, land, etc.), containment and recovery pollution equipment,technical means (simulators, models, laptops, etc.) |  |  |  |
| **Human resources** (Roles and responsibilities. Both from operational and management perspective) | Air |  |  |
| **Facilities** (including meeting rooms) |  |  |  |
| **Services for participants** (transport, accommodation, access, parking, food and refreshments) |  |  |  |
| **Information and Communication Technologies** (devices, hardware, software and Personal devices requested from participants) |  |  |  |
| **Identifications** (personal, roles and/or locations) |  |  |  |
| Other resources |  |  |  |
| **Legal and administrative considerations:** | | |  |
| **Safety and Health**. PPE (Personal protective equipment) |  |  |  |
| **GDPR** (General Data Protection Regulation) |  |  |  |
| Civil Liability |  |  |  |
| Authorizations/ Notifications |  |  |  |
| Certifications |  |  |  |
| Confidentiality |  |  |  |
| **Media and public relations** plan |  |  |  |
| Obtain **approval** from senior manager |  |  |  |

## Development phase:

| TASK | CHECK | Comments | Date |
| --- | --- | --- | --- |
| Establish **coordination team** (development phase) |  |  |  |
| Determine the **coordination and implementation plan** for the management of the activity |  |  |  |
| Preparatory meetings |  |  |  |
| Previous visits to the exercise area |  |  |  |
| Confirm the **availability of other Organizations/groups** involved |  |  |  |
| Develop the **exercise programme** (overall timing and activities) |  |  |  |
| Develop the **exercise scenario and documentation:** | | |  |
| **Timeline** and **Storyboard** (actions) for instructors. |  |  |  |
| **Injects for instructors.** |  |  |  |
| **Roles** and **responsibilities** (Trainees and instructors) |  |  |  |
| **Support documentation** to be used for trainees during Implementation phase**:**   * + Site Charts/map.   + Forecast/Backwards Model outputs   + Weather observation and forecast   + Vulnerability maps   + List of resources to be deployed and description.   + Product data sheet   + Vessel/installation….plans   + Others |  |  |  |
| Ensure that **logistic issues** have been addressed: | | |  |
| **Mandatory roles** for the proper development of the exercise are confirmed |  |  |  |
| Own and external Means to be deployed |  |  |  |
| **Facilities** (including meeting rooms, transport…) |  |  |  |
| **Services** (transport, accommodation, access, parking, food and refreshments) |  |  |  |
| **Information and Communication Technologies** |  |  |  |
| Request to bring **Personal equipment.** |  |  |  |
| **Identifications** (personal, roles and/or locations) |  |  |  |
| Other resources |  |  |  |
| **Develop the Operational communications plan:** | | |  |
| List of means for communications, access credentials and passwords, and roles associated |  |  |  |
| Official channels for communications and roles associated |  |  |  |
| List of **Safety Code Words** for the exercise (start, end, cancelled, etc.) |  |  |  |
| **Develop or adapt needed documentation:** | | |  |
| **Reports** to be sent to participants before the exercise. |  |  |  |
| Briefing and debriefing documents |  |  |  |
| Presentations |  |  |  |
| Checklists |  |  |  |
| **Signature list** for participants |  |  |  |
| Protocols and handling instructions for equipment |  |  |  |
| Legal forms to be signed |  |  |  |
| **Legal considerations**. Ensure you have sent the request and you have received: | | |  |
| **Legal forms** signed |  |  |  |
| **Information from participants** (i.e., personal data to have authorization to access a port or vessel) |  |  |  |
| Ensure that **contingencies** have been addressed and the information included in the pre-exercise report: | | |  |
| Inclement weather |  |  |  |
| Major or live incidents |  |  |  |
| Major communications failure |  |  |  |
| **Media and Public Relations plan:** | | |  |
| Save the date |  |  |  |
| Common guidelines for communications |  |  |  |
| Press releases |  |  |  |
| Verify specific needs for the attendance of Media (transport, specific timetables, etc.) |  |  |  |
| Appoint personnel to record the exercise (pictures, videos, etc.) |  |  |  |
| Invitations |  |  |  |
| Others |  |  |  |
| **Monitoring and evaluation plan:** | | |  |
| Dashboard |  |  |  |
| Checklist |  |  |  |
| Evaluation forms |  |  |  |
| Report format |  |  |  |
| Other monitoring and evaluation documentation |  |  |  |
| **Other** documentation |  |  |  |
| **Previous training:** | | |  |
| Prepare training and related activities (needed to develop the exercise) |  |  |  |
| Train the exercise trainers |  |  |  |
| **Battery of tests** (Software, resources, means, equipment, scenario…) |  |  |  |

## Implementation/Conduction phase

| TASK | CHECK | Comments | Date |
| --- | --- | --- | --- |
| Sent **pre-exercise reports** to participants |  |  |  |
| Sent **former documentation** (notifications, press release, etc.) |  |  |  |
| **Management team briefing/meeting**: Review the entire exercise (scenario, documentation, equipment, functions, flow of information, distribution…) |  |  |  |
| Prepare and tests **technical resources and equipment** |  |  |  |
| **Briefing for participants:**   * Review the exercise: Role responsibilities, actions involved, timing …) * Schedule, timing, and programme * Distribute documentation |  |  |  |
| Familiarisation with equipment, installations, etc. |  |  |  |
| Identification of participants |  |  |  |
| Implement the exercise |  |  |  |
| Monitoring: observe and collect for evaluation |  |  |  |
| Ensure that Media can work in optimal conditions |  |  |  |
| Ensure access and information of the **Services** (access, parking, food and refreshments) to participants |  |  |  |
| **After the exercise:** | | |  |
| Hot wash / Briefing |  |  |  |
| Delivery and collect evaluation forms (participants) |  |  |  |

## Evaluation phase

| TASK | CHECK[[2]](#footnote-2) | Comments | Date |
| --- | --- | --- | --- |
| Analyse collected data (evaluation forms and monitoring data) |  |  |  |
| Assess trainees performance (identify good practices and improvement areas) |  |  |  |
| Develop the **exercise report** |  |  |  |
| Make **recommendations** for trainees / organizations (good practices maintenance and itinerary of activities for improvement) |  |  |  |
| Establish **learnt lessons** for future activities/exercises |  |  |  |
| Prepare a clear and concise **summary report** |  |  |  |
| Distribute the exercise report or the summary (including press release and gratitude). |  |  |  |

1. Suggestions to fulfil the box: **🗷** *Done* **⎯** *Not applicable* [↑](#footnote-ref-1)
2. **✓** *Done* **⎯** *Not aplicable* [↑](#footnote-ref-2)