NEXUS PIONEER CONSULTING GROUP, LLC

Tabletop Exercise Planning Worksheet

Free Resource Template

A practical worksheet for defining exercise objectives, participants, scenario conditions, discussion questions, expected outcomes, and facilitation needs.

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Prepared By	Nexus Pioneer Consulting Group, LLC
Intended Use	Downloadable resource for planning, designing, and facilitating discussion-based tabletop exercises
User Entry	Exercise information and planning details may be completed on the next page

Where Experience and Innovation Converge in Crisis Preparedness

Template Use and Exercise Planning Instructions

Purpose: This worksheet supports a structured planning process for a discussion-based tabletop exercise. It helps the planning team define what the exercise must accomplish, who must participate, what conditions will frame the discussion, what questions will be asked, and what outputs should result.

Use: Use the worksheet during concept development, planning meetings, scenario design, facilitator preparation, final readiness review, exercise conduct preparation, and post-exercise follow-up.

Objective-first design: Build the exercise around clear objectives and observable decisions or outputs. The scenario should create the conditions needed to explore those objectives without becoming the focus of the exercise.

Public resource note: This free template is provided for planning support and does not replace organization-specific legal, regulatory, grant, accreditation, safety, security, or exercise policy requirements.

Planning Notation Options

Use status terms such as Draft, Confirmed, Pending, Leadership Decision Required, Not Applicable, or Follow-Up Required. Record an owner and due date whenever a planning item is not yet resolved.

Exercise Planning Information

Sponsoring Organization		**Exercise Date**	
Exercise Title		**Exercise Type / Format**	
Lead Planner		**Lead Facilitator**	
Planning Team		**Exercise Location / Platform**	
Primary Purpose		**Target Capability / Plan**	
Scenario Theme		**Known Constraints**	

1. Exercise Purpose, Scope, and Ground Rules

Define the exercise boundary before developing detailed scenario material. Keep the scope narrow enough to support meaningful discussion and clear enough that participants understand what will and will not be examined.

Planning Item	Draft / Decision	Source / Basis	Open Issue / Risk	Owner / Due Date
Readiness question or operational problem the exercise should address				
Plans, functions, capabilities, decisions, or relationships included in scope				
Topics, locations, systems, or actions explicitly outside the exercise scope				
Primary exercise purpose: orientation, validation, problem-solving, decision practice, coordination, or improvement verification				
Desired level of realism, complexity, time pressure, and simulated consequences				
Planning assumptions, artificialities, safety expectations, and discussion ground rules				

Planning prompt: What must participants understand before the exercise begins so they can focus on decisions, coordination, and operational consequences?

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2. Exercise Objectives

Write objectives as specific statements of what participants should discuss, demonstrate, clarify, validate, or produce. Each objective should connect to a plan, capability, known gap, corrective action, or leadership concern.

Objective #	Objective Statement	Linked Plan / Capability / Gap	Decisions or Actions to Observe	Expected Evidence / Output
1				
2				
3				
4				

Objective Quality Review

Quality Check	Status / Notation	Revision Needed
The objective is specific enough to guide scenario and question development.		
The objective can be explored through participant discussion and decisions.		
The objective identifies an observable action, decision, product, or clarification.		
The objective is achievable within the available exercise time and participant mix.		

3. Participants and Exercise Roles

Invite the people who hold the authority, information, operational responsibilities, or partner relationships needed to address the objectives. Avoid filling seats solely by title; participation should have a clear exercise purpose.

Participant / Organization	Exercise Role	Real-World Role / Authority	Decisions or Information Expected	Confirmation / Notes

Participant Mix Check

Role Category	Included / Not Needed	Rationale or Representative
Leadership / executive decision authority		
Operations / incident coordination / continuity		
Communications / public information / stakeholder messaging		
Technology, logistics, safety, security, or other specialized functions		

Role Category	Included / Not Needed	Rationale or Representative
External partners, vendors, mutual aid, or community stakeholders		

4. Scenario Conditions and Planning Assumptions

Describe only the conditions needed to place participants in a realistic decision environment. Validate critical assumptions with subject-matter experts and clearly distinguish simulated information from actual organizational conditions.

Scenario Element	Initial Condition / Assumption	Operational Impact	Information Available or Withheld	Source / Validation	Owner / Status
Threat, hazard, initiating event, or disruption					
Date, time, season, operating tempo, and environmental context					
Affected locations, facilities, services, populations, or jurisdictions					
Systems, utilities, communications, data, or infrastructure degraded or unavailable					
Personnel, resource, vendor, supply, or access constraints					
External partner, media, public, regulatory, or community conditions					

Planning prompt: Which conditions are essential to force the decisions tied to the objectives, and which details can be omitted to avoid distracting the group?

5. Scenario Timeline and Exercise Modules

Organize the scenario into a small number of modules that move participants from recognition through escalation, sustained operations, and transition. Each module should introduce a meaningful change that supports one or more objectives.

Module / Simulated Time	Situation Update or Inject	Decision or Discussion Required	Participants in Lead	Intended Learning / Observation
Start State / Initial Conditions				
Module 1 / Recognition and Activation				
Module 2 / Escalation and Coordination				
Module 3 / Sustained Operations and Continuity				
Module 4 / Stabilization, Recovery, or Transition				
End State / Hotwash Transition				

Planning prompt: Does each scenario change create a decision, coordination problem, information requirement, or operational consequence that directly supports an objective?

6.1. Discussion Questions - Initial Recognition and Activation

Use these questions to establish the operating picture, clarify authorities, and examine initial actions. Modify or replace any question that does not support an approved objective.

Discussion Question	Objective Supported	Lead Participant(s)	Expected Decision / Output	Facilitator Follow-Up
What has occurred, what is known, what remains uncertain, and what information is needed immediately?				
Who has authority to activate emergency, continuity, command, coordination, or notification processes?				
What are the immediate life-safety, service, mission, legal, or reputational priorities?				
Which internal and external notifications are required, who makes them, and what information is shared?				
How will the organization establish a common operating picture and validate incoming information?				
What assumptions, constraints, or missing resources could change the initial course of action?				

Planning prompt: Which follow-up question will expose assumptions, unresolved authority, coordination barriers, or second-order impacts without leading participants to a preferred answer?

6.2. Discussion Questions - Escalation, Coordination, and Sustained Operations

Use these questions to examine cross-functional coordination, information flow, resource decisions, public messaging, and the ability to sustain priority operations as conditions worsen.

Discussion Question	Objective Supported	Lead Participant(s)	Expected Decision / Output	Facilitator Follow-Up
How do priorities, command relationships, coordination structures, or meeting rhythms change as the incident escalates?				
What information must move between leadership, operations, departments, partners, and the public to support coordinated decisions?				
Which resources, mutual aid, vendors, specialists, or external authorities are needed, and how are requests prioritized?				
How will conflicting objectives, incomplete information, or competing demands be resolved and documented?				
What continuity, staffing, technology, facility, supply, or safety impacts emerge during sustained operations?				
How will public information, internal messaging, stakeholder communications, and rumor control remain aligned with operations?				

Planning prompt: Which follow-up question will expose assumptions, unresolved authority, coordination barriers, or second-order impacts without leading participants to a preferred answer?

6.3. Discussion Questions - Continuity, Recovery, and Improvement

Use these questions to explore transition criteria, restoration priorities, continuity decisions, recovery coordination, and the improvements that should follow the exercise.

Discussion Question	Objective Supported	Lead Participant(s)	Expected Decision / Output	Facilitator Follow-Up
What conditions or indicators support transition from response to continuity, stabilization, recovery, or normal operations?				
Which services, systems, facilities, records, suppliers, or workforce functions must be restored first, and who sets those priorities?				
What short-term workarounds or continuity strategies are available, and what risks do they introduce?				
Which partners, regulators, customers, elected officials, boards, or community stakeholders require continued coordination?				
What decisions, assumptions, dependencies, or unresolved risks must be documented for leadership follow-up?				
What plan updates, training, corrective actions, resource investments, or additional exercises are needed next?				

Planning prompt: Which follow-up question will expose assumptions, unresolved authority, coordination barriers, or second-order impacts without leading participants to a preferred answer?

7. Expected Outcomes and Observation Needs

Define what the planning team expects the exercise to produce. Outcomes should be practical and usable: clarified decisions, validated processes, identified gaps, updated assumptions, documented dependencies, or agreed improvement actions.

Expected Outcome	Related Objective	Observable Evidence	Who Will Capture It	How the Output Will Be Used
Leadership authorities, decision points, and escalation expectations clarified				
Initial priorities, protective actions, and operational objectives identified				
Coordination, notification, and information-sharing pathways validated				
Resource, continuity, staffing, technology, or partner dependencies identified				
Communications, public information, or stakeholder messaging needs clarified				
Improvement actions, plan updates, training needs, or further validation requirements defined				

8. Facilitation Needs and Exercise Support

Identify the people, materials, technology, room arrangements, controls, and contingency measures needed to keep the discussion focused, safe, accessible, and on schedule.

Facilitation Need	Requirement / Decision	Responsible Person	Due Date	Status / Notes
Lead facilitator and backup facilitator				
Controller, simulation support, or subject-matter experts				
Evaluator, observer, note-taker, and decision-log coverage				
Participant invitation, read-ahead, briefing, and confidentiality expectations				
Scenario materials, maps, visuals, injects, status boards, or handouts				
Room layout, seating, name tents, accessibility, breaks, and refreshments				
Virtual platform, audio/visual support, screen sharing, recording, technical test, and outage contingency				
Sensitive information handling, redaction, document control, and distribution limits				
Timekeeping, parking-lot issues, facilitator prompts, and module transitions				

9. Exercise Conduct Plan

Use this run-of-show to align the facilitator, support team, and planning team on the sequence, timing, participant activity, and output expected from each segment.

Suggested Time	Exercise Segment	Facilitator / Control Action	Participant Activity	Output / Transition
0-10 min	Welcome, purpose, objectives, and ground rules			
10-20 min	Scenario orientation and start state			
20-50 min	Module 1 discussion			
50-80 min	Module 2 discussion			
80-90 min	Break or operational reset			
90-120 min	Module 3 / transition discussion			
120-135 min	Participant hotwash			
135-145 min	Closing, next steps, and follow-up expectations			

Planning prompt: What opening language will establish the purpose, ground rules, assumption policy, documentation expectations, and information-handling requirements before the scenario begins?

10. Planning Decisions, Risks, and Unresolved Issues

Document design decisions and unresolved items so the exercise does not depend on informal assumptions. Elevate items that require leadership approval, additional resources, or changes to scope.

Key Planning Decisions

Decision	Rationale / Basis	Approval or Owner	Date	Impact on Exercise

Open Issues and Planning Risks

Issue or Risk	Why It Matters	Required Resolution	Owner	Due Date

11. Final Exercise Readiness Checklist and Approval

Complete this review before participant materials are released or the exercise is conducted. Use Follow-Up Required for any unresolved item and identify the decision authority for accepting residual risk.

Readiness Item	Status / Notation	Evidence / Confirmation	Owner / Follow-Up
Purpose, scope, objectives, and intended outcomes are approved and aligned.			
Participant organizations, decision authorities, and exercise roles are confirmed.			
Scenario conditions, critical assumptions, and discussion questions are validated and aligned to objectives.			
Facilitator, controller, evaluator, note-taker, support roles, and exercise materials are ready.			
Room, virtual platform, accessibility, safety, security, technology, and contingency requirements are confirmed.			
Sensitive information, distribution controls, recording, retention, and document handling are resolved.			
Observation, decision logging, hotwash, and follow-up documentation methods are ready.			
Leadership sponsor has been briefed; residual risks and post-exercise responsibilities are understood.			

Exercise Authorization

Lead Planner		**Leadership Sponsor**	
Date Approved		**Final Status**	Ready / Conditionally Ready / Not Ready

Common Source Materials and Planning Meeting Guide

Use these examples to ground exercise design in current plans, actual authorities, known risks, operational dependencies, and unresolved improvement needs. Adapt the list to the organization and exercise scope.

Plans, Risks, and Authorities	People, Operations, and Dependencies	Exercise and Improvement Records
• Emergency operations plans and annexes • Continuity, communications, cyber, evacuation, recovery, or crisis plans • Hazard, risk, vulnerability, and impact assessments • Delegations of authority, activation triggers, policies, and procedures	• Organization charts and role descriptions • Contact lists, vendor arrangements, mutual aid, and partner agreements • Resource inventories, staffing assumptions, facilities, technology, and critical services • Leadership concerns, operational constraints, and subject-matter expert input	• Prior exercise objectives, scenarios, evaluator notes, and after-action reports • Corrective action and improvement registers • Real-world incident, disruption, near-miss, and decision logs • Training gaps, audit findings, readiness reviews, and leadership briefings

Suggested 90-Minute Planning Meeting Format

Time	Focus	Planning Output	Facilitator Note
0-10 min	Purpose and constraints	Shared understanding of why the exercise is being planned and what decisions are needed	Keep the discussion objective-focused.
10-25 min	Scope and objectives	Draft scope and a manageable set of measurable objectives	Remove objectives that cannot be explored in the available time.
25-45 min	Participants and scenario conditions	Required participant roles and essential scenario assumptions	Invite people because of authority, knowledge, or dependency.
45-65 min	Modules and discussion questions	Scenario progression and questions aligned to each objective	Use scenario detail only when it creates a meaningful decision.
65-80 min	Outcomes and facilitation needs	Expected outputs, documentation method, and support requirements	Assign who will capture decisions, gaps, and follow-up actions.
80-90 min	Decisions and next steps	Owners, due dates, approvals, and unresolved risks	End with clear accountability and a next planning checkpoint.

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Guidance Alignment References

This worksheet is designed as a practical planning aid and is informed by widely used emergency management planning, exercise, incident management, continuity, and preparedness improvement guidance. Users should adapt it to their organization, jurisdiction, sector, and program requirements.

- FEMA Homeland Security Exercise and Evaluation Program guidance
- FEMA Comprehensive Preparedness Guide 101: Developing and Maintaining Emergency Operations Plans
- FEMA National Incident Management System
- FEMA Continuity Guidance Circular
- Applicable sector, accreditation, grant, regulatory, safety, security, and organizational exercise requirements

Website Resource Page Description

Tabletop Exercise Planning Worksheet: A free, downloadable template that helps organizations define exercise objectives, participants, scenario conditions, discussion questions, expected outcomes, facilitation needs, planning decisions, and final readiness requirements. Designed for emergency managers, preparedness professionals, continuity leaders, public safety organizations, healthcare, critical infrastructure, higher education, consultants, and internal exercise planning teams.

Use and Distribution Note

This template is intended for internal planning support. Organizations should remove, redact, or control sensitive operational details before broader distribution and should apply their own records-management, confidentiality, accessibility, and information-security requirements.

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