NEXUS PIONEER CONSULTING GROUP, LLC

Emergency Operations Plan Review Checklist

Free Resource Template

A practical checklist for reviewing whether an Emergency Operations Plan clearly defines roles, responsibilities, activation, coordination, communications, continuity, and operational decision-making.

Template Version	Version 1.0
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Prepared By	Nexus Pioneer Consulting Group, LLC
Intended Use	Downloadable resource for structured Emergency Operations Plan review and improvement support
User Entry	Organization / Plan / Review Team information may be completed on the next page

Where Experience and Innovation Converge in Crisis Preparedness

Template Use and EOP Review Instructions

Purpose: This checklist supports a structured review of an Emergency Operations Plan for clarity, currency, operational usability, and alignment across departments and partners. It helps reviewers identify strengths, omissions, unclear ownership, inconsistent triggers, missing procedures, and practical revision needs.

Use: The checklist may be used during annual plan maintenance, pre-exercise reviews, leadership briefings, accreditation or compliance preparation, corrective action meetings, plan approval cycles, or a broader preparedness assessment.

No scoring: This version intentionally does not include formal scoring criteria, weights, maturity ratings, or readiness calculations. Reviewers should apply professional judgment and organization-specific requirements when documenting findings.

Public resource note: This free template is provided for planning support and does not replace jurisdiction-specific legal, regulatory, grant, accreditation, policy, or compliance review.

Review Notation Options

Use the Status / Notation column to document the review result in plain language. Suggested terms include: Satisfactory, Partially Addressed, Needs Revision, Not Addressed, Not Applicable, or Follow-Up Required.

Plan Review Information

Organization		**Review Date**	
Lead Reviewer		**Review Team**	
Plan Title / Version		**Review Location / Format**	
Primary Review Purpose		**Known Constraints**	
Documents Reviewed		**Follow-Up Meeting Date**	
Approving Authority		**EOP / Preparedness Contact**	

1. Plan Foundation, Scope, and Governance

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Does the EOP clearly state its purpose, scope, applicability, planning assumptions, and intended users?				
Does the plan reflect current hazards, risks, authorities, structure, facilities, resources, and dependencies?				
Are plan ownership, approval, maintenance, version control, distribution, and supersession requirements defined?				
Are the base plan, annexes, appendices, procedures, job aids, and external plans connected and consistent?				
Do planning assumptions address degraded operations, staffing limits, access constraints, and cascading impacts?				
Are sensitive operational details, contact lists, security information, and restricted appendices properly controlled?				

Prompt for discussion: What must be revised to make the plan current, usable, and defensible?

2. Roles, Responsibilities, and Authorities

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Are emergency roles assigned to positions, offices, or functions rather than individual names?				
Are primary and alternate duties, succession, delegations, decision authority, handoffs, and relief documented?				
Are leadership, command or EOC, department, continuity, safety, legal, finance, HR, IT, logistics, and public information roles defined?				
Are assigned duties realistic, resourced, and compatible with NIMS or ICS principles where applicable?				
Are partner, mutual aid, vendor, facility, and jurisdiction expectations documented and confirmed?				
Can each critical role quickly identify required actions, timing, contacts, authority, and records?				

Prompt for discussion: Where could unclear authority, ownership, or handoffs delay action during an incident?

3. Activation Triggers, Escalation, and Notifications

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Does the plan identify who may activate or deactivate it, available activation levels, and related authority?				
Are activation and escalation triggers tied to hazards, impacts, resource conditions, continuity needs, or leadership decisions?				
Are partial, virtual, after-hours, multi-site, and geographically distributed activation options addressed?				
Are notification, acknowledgement, recall, staffing, and escalation processes documented with backup methods?				
Are activation triggers and notifications aligned across the EOP, annexes, continuity, cyber, communications, and partner plans?				
Are transition criteria defined for monitoring, activation, continuity operations, recovery, and demobilization?				

Prompt for discussion: Would personnel know when to activate, who to notify, and how to escalate without informal direction?

4. Coordination, Command, and Partner Integration

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Does the plan define relationships among incident command, the EOC, executive leadership, departments, sites, and continuity teams?				
Are command, coordination, support, and policy roles distinguished to prevent conflicting authority?				
Are briefings, reporting cycles, information requests, task assignment, and issue escalation processes defined?				
Are applicable government, private-sector, nonprofit, and critical service partner coordination pathways identified?				
Are mutual aid, resource requests, vendor support, emergency procurement, liaison, and cross-jurisdiction processes documented?				
Does the plan explain how unified coordination will be established for multi-agency or multi-jurisdiction incidents?				

Prompt for discussion: What coordination breakdowns are most likely, and how does the plan prevent or resolve them?

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5. Communications, Public Information, and Information Sharing

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Are primary, alternate, contingency, and emergency communications methods identified for all key audiences?				
Are notification, alert and warning, call-down, accessibility, and language access needs addressed?				
Are situation reporting, common operating picture, data validation, and information-sharing responsibilities defined?				
Are spokesperson approval, joint information coordination, rumor control, social media, and media monitoring processes described?				
Are cybersecurity, interoperability, power or connectivity loss, communications dependencies, and backup testing considered?				
Are controls clear for sensitive, protected, personal, health, legal, or security-related information?				

Prompt for discussion: Can the organization maintain trusted communications and shared situational awareness when systems fail?

6. Continuity, Essential Functions, and Operational Sustainment

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Does the EOP connect with continuity planning and identify essential functions, services, and sustainment priorities?				
Are continuity activation, succession, delegations, alternate facilities, remote work, vital records, and reconstitution addressed?				
Are staffing depth, cross-training, shift relief, safety, accountability, family support, and sustained operations considered?				
Are critical dependencies such as power, communications, IT, facilities, supply chain, vendors, transportation, fuel, and water addressed?				
Are emergency procurement, financial management, timekeeping, cost tracking, documentation, and reimbursement included?				
Are transitions among response, continuity, recovery, restoration, reconstitution, and normal operations defined?				

Prompt for discussion: What must continue, what dependencies could fail, and how long can operations be sustained?

7. Operational Decision-Making and Situational Awareness

EOP Review Item	Status / Notation	Plan Reference / Evidence	Review Notes / Findings	Owner / Follow-Up
Does the plan identify key strategic, coordination, and tactical decisions, responsible officials, and timing?				
Are decision points tied to life safety, stabilization, continuity, legal duties, equity, protection, and recovery priorities?				
Does the plan define decision information needs, validation methods, and communication of uncertainty and assumptions?				
Are objectives, action planning cycles, decision logs, status boards, resource tracking, and documentation addressed?				
Are processes included for conflicts, competing priorities, scarce resources, policy questions, and leadership escalation?				
Are demobilization, recovery transition, after-action review, corrective action, and plan revision criteria defined?				

Prompt for discussion: Does the plan support timely, documented, and defendable decisions under uncertain conditions?

8. EOP Review Summary

Use this section to convert checklist findings into a focused plan improvement conversation. Keep entries specific, evidence-based, tied to plan references, and connected to clear owners.

Key Strengths

Strength	Supporting Plan Reference / Evidence	Why It Matters

Key Gaps or Required Revisions

Gap or Required Revision	Operational Risk / Impact	Recommended Plan Change	Owner / Due Date

Follow-Up Questions for the Plan Owner

Questions Needing Clarification

Question	Responsible Person / Office	Follow-Up Needed By

Recommended Revision Actions

Recommended Revision Action	Responsible Office	Suggested Timeframe

30 / 60 / 90-Day Plan Improvement Planning

Timeframe	Priority Plan Revision	Owner	Due Date	Evidence of Completion
30 Days				
60 Days				
90 Days				

Reviewer / Facilitator Certification

Reviewer Name		**Title / Organization**	
Date Reviewed		**Plan Title / Version**	
Reviewed Materials		**Additional Notes**	

Common EOP Review Sources and Facilitation Guide

Use these examples to keep the review grounded in what can be located, cited, compared, tested, or validated. Organizations should adapt the list to their sector, jurisdiction, authorities, and operational environment.

Plan Foundation and Governance	Operations and Coordination	Validation and Improvement
• Current EOP and base plan • Functional and hazard annexes • Plan approval and maintenance records • Hazard and risk assessments • Authorities, policies, and delegations • Distribution and document-control records	• EOC, command, and coordination procedures • Activation matrices and checklists • Contact, call-down, and notification rosters • Mutual aid and partner agreements • Resource request and procurement procedures • Communications, PACE, and public information plans	• Exercise after-action reports and improvement plans • Incident, decision, and situation logs • Training and notification test records • Corrective action register • Continuity and cyber incident plans • Readiness dashboards or status reports

Suggested 60-Minute Discussion Format

Time	Focus	Discussion Output	Facilitator Note
0-10 min	Purpose and scope	Confirmed plan version, purpose, and constraints	Confirm the document and review objective.
10-35 min	Checklist sections	Initial strengths, gaps, and plan references	Use Not Addressed when evidence is unavailable.
35-50 min	Priorities and ownership	Top revisions, owners, and near-term actions	Prioritize life safety, authority, activation, communications, continuity, and decisions.
50-60 min	Leadership summary	Decisions, resources, timeline, and approval path	Convert findings into an approval-ready update plan.

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Guidance Alignment References

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

- FEMA Comprehensive Preparedness Guide 101: Developing and Maintaining Emergency Operations Plans
- FEMA National Incident Management System
- FEMA Continuity Guidance Circular
- FEMA Homeland Security Exercise and Evaluation Program guidance
- CISA National Emergency Communications Plan and PACE planning concepts

Website Resource Page Description

Emergency Operations Plan Review Checklist: A free, downloadable template that helps organizations review EOP roles, responsibilities, activation triggers, coordination, communications, continuity, and operational decision-making. Designed for emergency managers, preparedness professionals, department leaders, consultants, and internal planning teams.

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