# Appendix B: Sample Planning Checklists

## Preparation

| **Tasks** | **Assigned To** | **Due Date** |
| --- | --- | --- |
| Identify date, time, and location for workshop |  |  |
| Develop invite list |  |  |
| Develop and distribute workshop invitation letter, including an RSVP deadline |  |  |
| Issue data call for jurisdictions’/organizations’ factors to consider during workshop discussion |  |  |
| Develop and distribute workshop read-ahead material, including:* Description of the workshop purpose and desired outcomes
* Workshop agenda
* Integrated Preparedness Plan from previous year
* Summary of After-Action Reports/Improvement Plans from the previous year’s exercises and real-world incidents, including progress made to date
* Overview of the current threat or hazard environment, such as Threat and Hazard Identification and Risk Assessment (THIRA) information
* Capabilities and/or additional reference documents
 |  |  |
| Complete workshop logistical arrangements, including venue selection, room setup, audio/visual equipment, material production, etc. |  |  |

## Conduct

| **Tasks** | **Assigned To** | **Due Date** |
| --- | --- | --- |
| Conduct final arrangement checks with venue (including walkthrough with hotel/workshop manager) |  |  |
| Register all Integrated Preparedness Planning Workshop attendees |  |  |
| Select designated workshop facilitator (if one is not provided) and breakout group facilitators as required |  |  |
| Designate note-taker to record workshop discussion |  |  |

## Follow-Up

| **Tasks** | **Assigned To** | **Due Date** |
| --- | --- | --- |
| Draft Integrated Preparedness Planning Workshop summary |  |  |
| Distribute Integrated Preparedness Planning Workshop summary to participants and submit to appropriate authority |  |  |
| Submit final IPP to participants and appropriate authority |  |  |

# Appendix C: Sample Invitation Letter

**To:** [Jurisdiction/Organization Representative]

**From:** [Jurisdiction/Organization Representative]

**Date:** [Date]

**Subject:** Integrated Preparedness Planning Workshop

[Sponsor Jurisdiction/Organization] invites you to attend the Integrated Preparedness Planning Workshop on [date] at [location].

The workshop will begin at [time] and conclude at [time]; attendee registration will begin at [time].

An IPPW provides the opportunity to collaboratively establish preparedness priorities and develop or update the Integrated Preparedness Plan. Coordination of preparedness activities is important for us to prevent duplication of efforts, ensure resources are not overextended, and maximize the efficacy of preparedness activity appropriations. Moreover, schedule collaboration presents opportunities for jurisdictions/organizations to fulfill multiple preparedness requirements with a single activity.

Participants should be prepared to provide input to the preparedness priorities and development of the Integrated Preparedness Plan. In order to facilitate productive discussions at the Integrated Preparedness Planning Workshop, participants should submit the following information to [POC] by [date]:

* Completed jurisdiction/organization Integrated Preparedness Planning Workshop Data Call;
* Summary of jurisdictional/organizational threat and hazard information;
* Corrective actions and/or areas for improvement from exercises and real-world incidents;
* External sources and requirements, such as homeland security strategies, preparedness reports, or industry reports; and
* Accreditation standards and regulations.

Participants should also review the following read-ahead material:

* Previous year’s Integrated Preparedness Plan; and
* [Capabilities or other references, as appropriate].

Because of the importance of preparedness planning decisions, we ask that any requests for additional attendees or alternate representatives be made through [Sponsor Jurisdiction/Organization].

We look forward to your participation in this workshop.

Attachments:

* Jurisdiction/Organization Integrated Preparedness Planning Workshop Data Call,
* Agenda, and
* [Other read ahead material, as appropriate].

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# Appendix D: Sample Integrated Preparedness Planning Workshop Pre-Conduct Questionnaire

**To:** [Jurisdiction/Organization Representative]

**From:** [Jurisdiction/Organization Representative]

**Date:** [Date]

***Sponsoring a successful IPPW is a team effort and should not rest solely with training and exercise personnel.*** Recommended stakeholders that should be able to assist in answering these questions include personnel with knowledge of hazard analysis, risk assessment, and capabilities assessment; grants management and budgeting; planning; training and exercises; recovery and mitigation; and city management/planning. This list is not all inclusive and should be tailored to the unique structure and needs of the jurisdiction/organization.

The creation of an effective capabilities-based preparedness program begins with an Integrated Preparedness Plan (IPP) which establishes overall preparedness priorities and outlines a multi-year schedule of preparedness activities designed to address those priorities and validate capabilities. ***The IPP and IPPW are intended to plan and synchronize all aspects of preparedness, not just training and exercises, in an effort to address capability gaps and improve overall preparedness.***

The IPPW provides an interactive forum for Whole Community stakeholders to engage in the creation of the IPP. The IPPW also serves to coordinate preparedness activities across organizations in order to maximize the use of resources and prevent duplication of effort. With limited resources and budget constraints, it is acknowledged that not all prioritized activities will be able to be accomplished. As such, it is imperative that all stakeholders attend the workshop to facilitate the required coordination.

To provide a successful and collaborative environment during the workshop, [sponsor] has provided this worksheet to assist in gathering the necessary information from the applicable stakeholders depending on your individual jurisdiction/organization structure.

Answering the following questions should guide your jurisdiction/organization appropriately. Please return the below responses to [Jurisdiction/Organization Representative] by [Date]:

|  |
| --- |
| 1. What are your jurisdiction’s/organization’s greatest threats and risks?
 |
|  |
| 1. What are your jurisdiction/organization preparedness priorities?
 |
|  |
| 1. What are the capabilities associated with those priorities?
 |
|  |
| 1. What plans are in place to support the capability/priority (Planning)?
 |
|  |
| 1. What organizational structure is in place to support the capability, priority, and/or plan (Organization)?
 |
|  |
| 1. What equipment/facility is needed to support the capability, priority, plan, and/or organizational structure (Equipment)?
 |
|  |
| 1. What training is needed to support the capability, priority, plan, organizational structure, and/or equipment and facilities (Training)?
 |
|  |
| 1. What exercises are needed to validate the capability, plan, organizational structure, equipment, facilities, and/or training, including changes made to those elements (Exercise)?
 |
|  |
| 1. What has been learned that needs to be improved in the new cycle (Improve)?
 |
|  |

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# Appendix E: Sample Integrated Preparedness Planning Workshop Agenda

Note: As reflected in this example, the Integrated Preparedness Planning Workshop (IPPW) is not designed to be completed as a two-hour event. Enough time must be allotted to coordinate through ALL sections of the workshop.

| Time | Activity |
| --- | --- |
| 8:30 a.m. | Registration |
| 9:00 a.m. | Welcome and Introductions |
| 9:15 a.m. | IPPW Overview |
| 9:30 a.m. | Identify Preparedness Priority Factors |
| 11:00 a.m. | Establish Preparedness Priorities |
| 12:00 p.m. | Lunch |
| 1:00 p.m. | Develop Multi-Year Schedule |
| 2:30 p.m. | Program Reporting |
| 4:45 p.m. | Hotwash |
| 5:00 p.m. | Adjourn |

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