Tabletop Exercise (TTX) Toolkit

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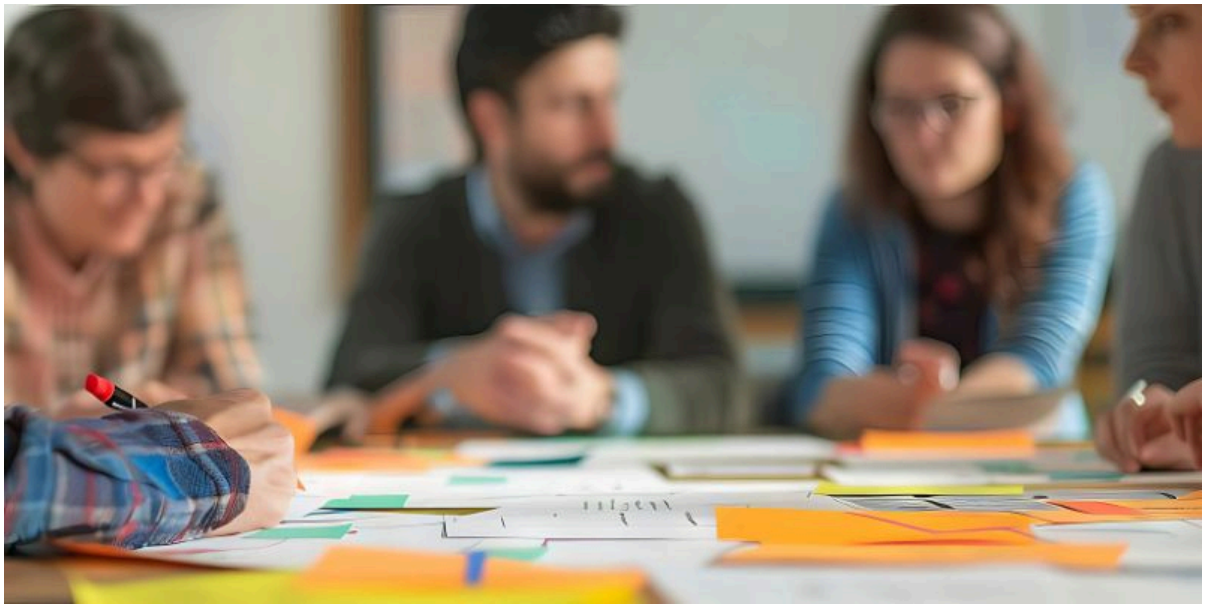

Emergency preparedness is a crucial aspect of any organization's risk management strategy. Being prepared for unforeseen events and crises can make a significant difference in minimizing potential damages and ensuring the safety and well-being of patients, staff, and visitors. One effective method for evaluating and strengthening emergency preparedness is conducting tabletop exercises. Tabletop exercises serve as a powerful tool to assess and enhance emergency preparedness and response measures.

The following toolkit provides a framework for conducting tabletop exercises (TTX). By simulating various emergency scenarios in a controlled and safe environment, departments can test and challenge their emergency response capabilities, enabling them to confidently respond during a real-world emergency.

Use this toolkit to strengthen your organization's emergency preparedness, ensuring a coordinated, effective response in times of crisis. Download now and take proactive steps to enhance safety and resilience in your healthcare setting.

What Is Included

This comprehensive Tabletop Exercise Toolkit provides a structured framework for planning, conducting, and evaluating emergency preparedness exercises. Key components include:

- **Planning Templates** – Step-by-step guides for structuring effective TTX sessions
- **Stakeholder Identification** – Strategies for involving key personnel in emergency preparedness
- **Scenario Development** – Guidance on crafting realistic emergency situations
- **Facilitation Techniques** – Best practices for leading discussions and engaging participants
- **Performance Assessment** – Tools for post-exercise evaluation and continuous improvement

- **After Action Reporting** – Frameworks for documenting outcomes and implementing enhancements

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Framework

The following toolkit provides a framework for conducting tabletop exercises (TTX):

- Planning Templates
- Background
  - Flexibility Statement
  - Confidentiality
- Preparing a TTX
  - Define Objectives
  - Identifying Key Stakeholders
  - Establishing a Planning Timeline
  - Conducting Planning Meetings
  - Ensuring Effective Communication
  - Develop the Situation Manual (Sitman)
  - Design Exercise Material
  - Conduct Briefing
- Conducting a TTX
  - Introduce the Exercise
  - Setting the Stage
  - Facilitate Discussion
  - Manage Time and Pace
  - Encourage Reflection
  - Exercise Wrap-Up
- Assessing a TTX
  - Post-Exercise Debrief
  - Review Performance
  - Review Outcomes
  - Develop After Action Report
  - Continuous Improvement

Planning Templates

Planning Templates

- Exercise Objectives Worksheet
  - View PDF | Download DOCX
- Situation Manual (SitMan)
  - View PDF | Download DOCX
- TTX Gantt Chart
  - View PDF | Download XLSX

TTX Planning Meeting Emails

- **Outlook**
  - TTX Announcement Email Template
    - View PDF | Download EML
  - Follow-Up Planning Meeting for [exercise name] Tabletop Exercise
    - View PDF | Download EML
  - Facilitator Briefing for [Exercise Name] Tabletop Exercise
    - View PDF | Download EML
  - Evaluator Briefing for [Exercise Name] Tabletop Exercise
    - View PDF | Download EML

- **Microsoft Word**
  - TTX Announcement Template
    - View PDF | Download DOCX
  - TTX Toolkit Follow-Up Email Template
    - View PDF | Download DOCX
  - TTX Toolkit Evaluator Briefing Email Template
    - View PDF | Download DOCX
  - TTX Toolkit Facilitator Briefing Email Template.
    - View PDF | Download DOCX

Planning Meeting

- Initial Planning Meeting
  - View PDF | Download PPTX
- Mid Planning Meeting
  - View PDF | Download PPTX
- Final Planning Meeting
  - View PDF | Download PPTX
- Facilitator & Evaluator Briefing
  - View PDF | Download PPTX
- TTX Module
  - View PDF| Download PPTX

- Exercise Facilitator Guide
  - View PDF | Download DOCX
- Exercise Evaluator Guide
  - View PDF | Download DOCX
- Participant Sign-in Sheet
  - View PDF | Download DOCX
- Participant Feedback Survey
  - View PDF | Download DOCX

Debrief Templates

- Debrief Email
  - View PDF| Download DOCX
- Tabletop Exercise Debrief – [Exercise Name]
  - View PDF | Download EML
- Debrief Guide
  - View PDF | Download DOCX
- Debrief Presentation PPT
  - View PDF | Download PPTX
- After Action Report (AAR) Short Form
  - View PDF | Download DOCX
- Improvement Tracking Tool
  - View PDF | Download XLSX

Other TTX Tools

Microsoft Teams Breakout Rooms

Print Book & Download All Files

Print Book

Download Files

Background

What is a tabletop exercise?

A TTX is a facilitated discussion, conducted in a controlled setting. It allows participants to collaboratively address challenges and solve problems that may arise during an emergency scenario, based on their existing plans.
It is NOT meant to be a planning or training session, but rather a tool to evaluate and revise policies, plans, and procedures.

Why conduct a tabletop exercise?

Tabletop exercises help organizations build capability, evaluate emergency response and business continuity plans, and identify strengths and areas for improvement. They offer staff the opportunity to simulate their roles and responsibilities during an incident, subsequently strengthening their preparedness and awareness. These exercises are cost-effective and provide a low-stress environment for learning and refining response strategies.

How long is a tabletop exercise?

Typically lasting 1-4 hours, tabletop exercises are flexible to allow participants time to have discussions and make informed decisions without minimal pressure. Although finding a “perfect” time to conduct a tabletop exercise can be challenging, ensuring maximum participation is crucial for promoting appropriate and effective engagement.

Flexibility Statement

This TTX toolkit is designed with adaptability in mind, catering to the unique needs of pediatric facilities. It offers a wide range of realistic emergency scenarios, customizable exercise structures, and control over the exercise’s pace and flow. The toolkit encourages continuous improvement through post-exercise analysis and debriefing.

Confidentiality

The exercise may address sensitive issues and include detailed response plans and potential limitations. Both planners and participants must handle exercise-related information with sensitivity. Information pertaining to the exercise must not be reproduced or disclosed without explicit consent from organization leadership. All written or typed material created during the planning and execution of the tabletop exercise should be treated as sensitive.

Preparing a TTX

Preparation is crucial for tabletop exercises as it sets the stage for success. It aligns goals, identifies weaknesses, and engages stakeholders, ensuring a focused and realistic simulation. This groundwork is vital for effectively testing and improving an organization's emergency readiness, fostering resilience in the face of unforeseen challenges.

Define Objectives

To create a robust preparedness exercise within an organization, start by conducting a comprehensive needs assessment to understand the organization's emergency readiness level. Pinpoint areas that need improvement, focusing on response protocols, communication strategies, decision-making processes, and overall readiness.

Simultaneously define the scope of the TTX. Understanding the exercise's complexity and the specific aspects to be tested lays the foundation for identifying relevant stakeholders, structuring the planning meetings, and concentrating efforts on specific areas that require attention, ensuring a more targeted and effective exercise.

Establish SMART goals (specific, measurable, achievable, relevant, and time-bound) to enhance the organization's emergency preparedness. Tasks within the SMART framework should encompass:

- Evaluating responses to simulated emergency scenarios.
- Refining procedures based on identified strengths and weaknesses.
- Recognizing communication targets to enhance coordination during emergencies.
- Setting clear goals for improvement in various aspects of emergency response.
- Evaluating decision-making abilities under simulated pressure.

Ensure that the objectives set for the TTX align seamlessly with the broader goals and priorities of the organization. Aligning exercise objectives with organizational goals ensures that the outcomes contribute directly to the overall success and resilience of the organization.

Templates for Developing SMART Objectives

- Exercise Objectives Worksheet
  - View PDF | Download DOCX

Identifying Key Stakeholders

Establishing a comprehensive planning team and involving key stakeholders is crucial for effective emergency response and recovery planning. Ensure representation from diverse departments and various levels of authority. Involving a spectrum of perspectives fosters comprehensive discussions, enhancing the realism of the exercise and ensuring a broad array of expertise.

Roles and responsibilities within the planning team should be clearly defined, assigning specific tasks related to logistics, scenario development, communications, evaluation, and other pertinent aspects. This clarity streamlines the planning process, ensuring efficiency and accountability.

Moving to participant involvement, both internal and external, significantly enriches the depth of perspectives and expertise vital for a successful emergency response and recovery simulation. Consider the following groups:

Clinical – Involve representatives from relevant clinical departments and positions as necessary, i.e., physicians, nurses, paramedics, and other medical staff.

Non-Clinical – Engage representatives from non-clinical departments, such as administrators, operations, IT, facilities management, and logistics.
- **Security & Transportation** – Include security and transportation personnel responsible for ensuring scene safety and maintaining order during emergencies.
- **Safety** – Include safety and occupational health personnel responsible for ensuring safe care practices for patients and employees.
- **Information Technology (IT)** – Engage IT staff to address technical requirements and ensure communication systems are functional.
- **Facilities Management** – Involve facilities management staff responsible for maintaining the physical infrastructure and security of the hospital.
- **Accreditation & Regulatory Readiness (ARR)** – Involve ARR staff responsible for ensuring regulatory and accreditation compliance.
- **Other applicable internal departments**

External Stakeholders
- **Local Emergency Services** - Police, fire, emergency medical services (EMS), etc.
- **Public Health Authorities** - Representatives from local public health departments.
- **Government Officials** - Consider inviting local government officials involved in emergency management.
- **Community Representatives** - Engage representatives from neighboring communities and leaders.
- **Nearby Medical Facilities** - Include representatives from neighboring hospitals or medical facilities.
- **Volunteer Organizations** - Engage representatives from volunteer programs and organizations offering support during emergencies.
- **Educational Partnerships** - If applicable, engage representatives from affiliated medical schools, nursing programs, environmental safety programs, emergency management programs, etc.
- **Legal and Insurance Representatives** - Invite representatives from legal and insurance departments to address

related aspects.

- **Patient and Family Advisors** - Involve representatives from patient and family advisory councils or support groups.

Establishing a Planning Timeline

Setting a Target Exercise Date:
Determining the target exercise date is a critical milestone in the planning process. Careful consideration of factors such as operational readiness, participant availability, and potential conflicting events or seasons ensures the exercise takes place at an optimal time. By choosing the right date, stakeholders can fully commit to the planning process, ensuring maximum engagement and participation.

Create a Planning Timeline:
Developing a comprehensive planning timeline is essential to keep the process on track. This timeline should include key milestones such as planning meetings, document reviews, and exercise revisions. By establishing a structured timeline, planners ensure that all necessary tasks are completed within the specified timeframe, minimizing the risk of delays, or rushed preparations.

Templates for Effective Planning

- TTX Gantt Chart
  - View PDF | Download XLSX

Conducting Planning Meetings

Initiating the Planning Process:

The initial planning meeting sets the groundwork for the entire process. By scheduling this meeting well in advance of the target exercise date, stakeholders can outline the planning process, assign roles, and establish clear communication channels. This meeting serves as a platform to address any initial concerns and clarify expectations for all involved parties.

Adjusting Meeting Frequency:

The frequency of subsequent planning meetings should be based on the intricacy of the scenario and the number of stakeholders involved. More complex exercise with numerous participants may necessitate additional planning meetings to adequately address various aspects.

Templates for Effective Meetings

- Initial Planning Meeting
  - View PDF | Download PPTX
- Mid Planning Meeting
  - View PDF | Download PPTX
- Final Planning Meeting
  - View PDF | Download PPTX

Ensuring Effective Communication

Maintaining timely communication is pivotal to keeping all stakeholders informed and engaged throughout the planning process. Sending meeting invitations, agendas, and reminders ensures active participation. Avoiding major holidays or conflicting events when scheduling meetings further fosters focused involvement and mitigates attendance issues.

Templates for Effective Communications

- **Outlook**
  - TTX Announcement Email Template
    - View PDF | Download EML
  - Follow-Up Planning Meeting for [exercise name] Tabletop Exercise
    - View PDF | Download EML
  - Facilitator Briefing for [Exercise Name] Tabletop Exercise
    - View PDF | Download EML
  - Evaluator Briefing for [Exercise Name] Tabletop Exercise
    - View PDF | Download EML
- **Microsoft Word**
  - TTX Announcement Template
    - View PDF | Download DOCX
  - TTX Toolkit Follow-Up Email Template
    - View PDF | Download DOCX
  - TTX Toolkit Evaluator Briefing Email Template
    - View PDF | Download DOCX
  - TTX Toolkit Facilitator Briefing Email Template.
    - View PDF | Download DOCX

Develop the Situation Manual (Sitman)

Developing the Situation Manual (SitMan) involves crafting a comprehensive document crucial for emergency preparedness exercises. This SitMan outlines scenarios tailored for training or simulation purposes, providing a detailed progression of a simulated emergency or crisis.

The process begins by identifying pertinent emergency scenarios, analyzing the organization's operations, location, and vulnerabilities to understand specific risks during crises. Crafting a compelling storyline customized for a Tabletop Exercise (TTX) involves intricately detailing the scenario's context, triggering events, and progression. This detailed narrative significantly enhances engagement and readiness among participants, setting the stage for the simulated emergency scenario.

Effective SitMan development challenges participants with realistic obstacles and decision points, nurturing critical thinking in the face of complex emergencies. Integrating risk analysis, detailed narratives, and realistic complexity creates a robust foundation for emergency preparedness training. This holistic approach ensures exercises align with the organization's context, effectively enhancing participants' critical thinking and response skills during crises. The SitMan serves as a pivotal tool, simulating real-world scenarios and empowering individuals and teams to adeptly handle emergencies with confidence and proficiency.

Template for Situation Manual

- Situation Manual (SitMan)
  - View PDF | Download DOCX

Design Exercise Material

Facilitator Guide:

Craft a comprehensive facilitator guide detailing instruction, timelines, discussion prompts, and key points. This guide assists facilitators in steering the exercise, ensuring smooth progression, active participation, and achieving exercise objectives.

Exercise Evaluation Guides (EEGs):

Develop an evaluation guide outlining criteria, metrics, and methodologies for assessing participant performance, decision-making, and overall exercise effectiveness. The EEG enables structured evaluation and post-exercise analysis, facilitating valuable insights for improvement.

Supportive Visuals:

Craft visual aids like maps, charts, or graphs to aid participant comprehension of the scenario and necessary actions. Elevate engagement by leveraging interactive tools such as simulations, gamified scenarios, or immersive components. Incorporate dynamic platforms like Kahoot, Poll Everywhere, Powtoon, or other interactive tools to amplify participant engagement and solidify essential concepts throughout the exercise. Additionally, consider including player cards if applicable, further enhancing the participant experience. These tools create an immersive and interactive experience, enhancing learning and retention during the tabletop exercise.

Gathering Reference Materials:

Provide participants with a comprehensive set of reference materials, including relevant policies, procedures, and data. These materials serve as guiding resources, informing participants' decision-making throughout the exercise, ensuring their responses align with organizational protocols and real-world considerations.

Templates for Effective Guides and Materials

- Exercise Facilitator Guide
  - View PDF | Download DOCX
- Exercise Evaluator Guide
  - View PDF | Download DOCX

Conduct Briefing

Before the exercise, prepare facilitators and evaluators by conducting a comprehensive Facilitator and Evaluator Briefing. Provide them with the essential skills and understanding required for their roles and responsibilities.

For facilitators, this includes refining their abilities in managing discussions, maintaining time efficiency, and adeptly guiding participants through the exercise. This briefing ensures facilitators are well-equipped to lead and support participants effectively during the exercise.

Evaluators play a crucial role in exercises by objectively assessing participant performance based on the exercise evaluation guides, collecting valuable data, and providing insights for improvement. Their observations and assessments contribute to refining emergency response strategies and enhancing overall preparedness.

Templates for Effective Briefings

- Facilitator & Evaluator Briefing
  - View PDF | Download PPTX

Conducting a TTX

Once the preparation phase is complete, it's time to facilitate the tabletop exercise. This stage involves orchestrating the simulated scenario, guiding participants through the exercise phases, and fostering an environment conducive to learning and improvement.

Templates for Effective Delivery

- Participant Sign-in Sheet
  - View PDF | Download DOCX
- TTX Module
  - View PDF| Download PPTX

Introduce the Exercise

Begin by introducing the scenario to participants, providing relevant background information and context. Clearly articulate the goals and objectives of the exercise and emphasize the importance of active engagement and collaboration.

Setting the Stage

Set clear guidelines and ground rules for participation, including communication protocols, roles and responsibilities, and any constraints within the exercise. Ensure everyone understands the boundaries of the simulation and the expected behavior during the exercise.

Facilitate Discussion

Guide participants through each phase of the exercise, using the Facilitator Guide as a roadmap. Encourage open discussions, critical thinking, and problem-solving among teams or individuals involved. Use the TTX Module PowerPoint template to present key information, stimulate discussions, and maintain the exercise's flow.

Manage Time and Space

Maintain a balance between allowing discussions to unfold naturally and ensuring the exercise progresses according to the predefined schedule. Keep track of time and facilitate transitions between different phases or aspects of the scenario. Be adaptive to unforeseen developments within the simulation.

Encourage Reflection

Throughout the exercise, encourage participants to reflect on their actions, decisions, and the effectiveness of their responses. Prompt discussions that dive into why certain decisions were made and how they align with established protocols or best practices.

Exercise Wrap-Up

Conclude the tabletop exercise by summarizing key takeaways, lessons learned, and any immediate observations or improvements identified. Thank participants for their involvement and have them complete a participant feedback survey.

Templates for TTX Feedback

- Participant Feedback Survey
  - View PDF | Download DOCX

Assessing a TTX

Assessing a tabletop exercise is a critical phase aimed at extracting insights, evaluating performance, and identifying opportunities for improvement. This phase allows for a comprehensive review of the exercise's effectiveness and serves as a catalyst for enhancing the organization's preparedness.

Post-Exercise Debrief

Conduct a structured debriefing session to gather feedback from participants and leaders. Use this opportunity to further discuss strengths, weaknesses, and opportunities for improvement. Document insights and action items generated during the debrief for future enhancements to response plans and procedures.

Templates and Resources for Exercise Debrief

- Debrief Presentation PPT
  - View PDF | Download PPTX
- Debrief Email
- - View PDF| Download DOCX

Review Performance

Review individual and team performance documented on the exercise evaluator guides. Assess adherence to protocols, decision-making processes, communication effectiveness, and the ability to execute response procedures. Identify notable successes and areas that require improvement.

Review Outcomes

Compare exercise outcomes and observations against predefined objectives and expected outcomes. Analyze participant feedback to identify common themes and areas of concern. These insights provide a nuanced understanding of the exercise's impact and areas requiring attention or improvement.

Develop After Action Report

Compile a comprehensive report summarizing the assessment findings, key observations, lessons learned, and proposed action items. Communicate these results and insights to relevant stakeholders and decision-makers to ensure informed engagement in the improvement process.

Template for After Action Report

- After Action Report (AAR) Short Form
  - View PDF | Download DOCX

Continuous Improvement

Based on the assessment outcomes, create an action plan outlining specific steps to address identified weaknesses or gaps. Assign responsibilities, set timelines, and establish clear objectives for implementing improvements. Use gained insights to update response plans, refine protocols, conduct additional training, or design follow-up exercises. This iterative process ensures continual enhancement of the organization's preparedness and response capabilities.

Template for Action Items

- Improvement Tracking Tool
  - View PDF | Download XLSX

Acknowledgement

This template was created by Children's Mercy Kansas City Emergency Management and made available for public use by the Pediatric Pandemic Network (PPN).

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