**FX02 Scoping Mission Terms of Reference (TOR) Template**

##

## **Introduction**

*These terms of reference (TOR) describe the purpose and structure of the scoping and planning mission for a functional exercise. They are agreed between the exercise director and the representative of the hosting organization (eg. MOH, WHO, etc.), following one or two teleconferences. They are critical for defining the following:*

* *The overview, objectives and outputs of the scoping missions (i.e. what has to be achieved)*
* *The stakeholders, roles and responsibilities during the scoping mission (i.e. who will take part in it and what they will do)*
* *The information and documents required for the scoping mission (i.e. how it will be achieved)*
* *The agenda of the scoping mission (i.e. when it will be achieved).*

 *For a FX, a scoping mission might be required. This would ideally take place two months before the anticipated exercise and would last one week. The main aim of the scoping mission is to discuss and agree on the exercise purpose, its specific objectives, the resources required, and who will be contributing—and in what manner—to the project. All the outcomes of the scoping mission are written into a* ***concept note*** *and signed off by the key stakeholders.*

## **Template**

Title: Scoping mission TOR for [**NAME**] functional exercise

[**COUNTRY**]

Tentative date of exercise: [**DD/MM/YYYY**]

### **Overview**

The overview presents a brief description of the country context, risk profile, previous exercises and training. It then presents the justification for a tabletop exercise and a scoping mission for the exercise.

### **Objectives of the scoping mission**

The objectives of the scoping mission are described.

*Suggested content:*

***2.1 Examples of objectives for scoping missions***

 *The general objective of the scoping mission is to define fully the exercise project and to ensure all stakeholders are in agreement. Specifically, the mission seeks to:*

* *Define the purpose, scope and objectives of the FX*
* *Support the establishment of an in-country exercise management team to lead the planning, conduction and evaluation of the exercise*
* *Develop a Gantt chart and timeline for the organization and roll-out of the exercise*
* *Develop a budget for the exercise*
* *Plan for all administrative, logistic and equipment aspects of the exercise*
* *Identify exercise facilitators and participants*
* *Assess the eventual need for participant trainings prior to the functional exercise*
* *Confirm what plans and SOPs are available and ready for use*
* *Adapt the master scenario, inject matrix, evaluation criteria and grid*
* *Ensure direct country involvement and ownership of the process.*

### **Outputs of the scoping mission**

Proposed outputs of the scoping mission should be in accordance with the objectives. The outputs are shared with the hosting organization.

*Suggested content:*

***3.1 Examples of outputs from scoping missions***

* *Exercise concept note*
* *TOR for exercise management team*
* *First exercise management team meeting and agenda for subsequent meetings*
* *Reconnaissance visit to exercise venue*
* *Gantt chart and project timeline*
* *Ensured direct country involvement and ownership of the process.*

### **Stakeholders, roles and responsibilities**

This section describes the stakeholders for the scoping mission. They usually consist of the WHO country office representative, a senior-level authority from the ministry of health, and the director of the exercise management team. The stakeholders for the scoping mission may also include representatives of the national agency disaster management organization as well as NGOs and other organisations such as the Red Cross, MSF, IOM and other technical and financial partners.

Stakeholders’ roles and responsibilities during the scoping mission are as follows:

* To discuss the purpose, scope and objectives of the functional exercise, as well as the work plan and timeline
* To discuss their roles and responsibilities in regard to the exercise planning, conduct and evaluation, and in particular the improvement plan and follow-up of the exercise.
* In particular, for the senior-level ministry of health authority to identify a director for the exercise management team and agree on the exercise, purpose, scope and objectives of the exercise, as well as its workplan and timeline.

### **Information and plans required for the scoping mission**

This section should list the information and plans required for the scoping mission.

*Suggested content:*

***5.1 Examples of information and plans required for the scoping missions***

* *Plans and SOPs relevant to the exercise*
* *Training plans (past training and training planned for before the exercise)*
* *Organograms (e.g. ministry of health, health EOC, national disaster management authority, other organizations relevant to the exercise).*

### **Agenda of the scoping mission**

This section proposes an agenda for the scoping mission.

*Suggested content:*

***6.1 Example agenda for the scoping mission***

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| *Sunday (DD/MM)* |
| *Arrival of the mission team* |
| *Monday (DD/MM)* |
| *08:00-09:30: Coordination meeting. Presentation of the mission team (WHO HQ and WHO CO). Discussion of mission TOR and agenda* |
| *09:30-10:00: Audience with WHO representative. Discussion of mission TOR and agenda* |
| *10:30-12:00: Coordination meeting. Mission team discussion of purpose, scope and objectives. Anticipated work plan and timeline. Exercise management TOR* |
| *12:00-13:30: Lunch* |
| *14:00: Audience with senior-level MOH Authority. Discussion of mission TOR and agenda. Identification of the exercise director* |
| *15:00-17:30: Revision of plans, SOPs, training, organogram and all other relevant information by mission team.* |
| *Tuesday (DD/MM)* |
| *08:00-08:30: Coordination meeting* |
| *08:30-10:00: Meeting with the exercise director. Discussion of mission TOR, agenda, purpose, scope, objectives of exercise and exercise management team* |
| *10:00-11:00: Security briefing* |
| *11:30-12:30: Meeting with partners on purpose, scope, objectives, work plan and timeline of the exercise* |
| *12:00-13:30: Lunch* |
| *11:30-13:30: Meeting with partners concerning purpose, scope and objectives of exercise, as well as work plan and timeline* |
| *13:30-17:30: Preparation of the first exercise management team* |
| *Wednesday (DD/MM)* |
| *08:00-08:30: Coordination meeting* |
| *08:30-13:00: Exercise management team meeting (consolidation of key elements of concept note; assignment of deadline and responsibilities; development of the workplan)* |
| *13:30-14:30: Lunch* |
| *14:30-17:30: Preparation of debriefings* |
| *Thursday (DD/MM)* |
| *08:00-9:00: Coordination meeting* |
| *09:00-10:00: Debriefing with WHO representative* |
| *10:00-10:30: Transport* |
| *10:30-11:30: Debriefing with senior-level MOH authority. Adoption of purpose, scope and objectives of exercise, as well as workplan and timeline* |
| *11:30-17:00: Redaction of exercise concept note and mission report* |

1. **Team members**

This section provides the names and roles of the team members conducting the scoping mission. It also clarifies who at the national level office will be the focal point for the mission, and will provide support during it.

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