**TTX04 Exercise Management Team Terms of Reference (TOR) Guidance Note**

1. **Introduction**

This guidance note describes the terms of reference (TOR) for the exercise management team for a tabletop exercise.

The exercise management team is responsible for designing, developing and implementing the simulation exercise project. Different members of this team may be brought on to the project at different phases in order to support the project activities.

1. **Roles & Responsibilities**

The following roles are an essential part of the exercise team developing, conducting and evaluating a tabletop exercise. At least one person should be identified for:

* **Exercise director** (also known as the **exercise coordinator**, or **exercise manager**):

This role, usually occupied by a single person, coordinates the planning team and has overall responsibility for the exercise. The exercise manager also develops the main concept and design of the exercise, acting as a project manager and bringing additional staff into the planning team as needed to ensure that the exercise development remains on track (e.g. bringing in subject matter experts during the scenario development). Because this function is so critical, it should be assigned to an individual who can devote significant time to the exercise throughout the process. This person must be familiar with the plan being tested, and should have an understanding of the kind of response that is expected. However, this person should *not* be expected to participate in the exercise, as he or she will be unable to participate in an authentic way if involved in the design and conduct of the exercise.

* **Lead facilitator*:*** *(This function may or may not be carried out by the exercise manager.)* The role of the lead facilitator is to lead the exercise implementation phase by using the scenario and the injects. He or she will work closely with the lead evaluator.

The lead facilitator must monitor and adjust the exercise to ensure that it achieves its goals. If participants are moving too quickly or too slowly through the information, the facilitator adjusts the timing of the injects, or delivers ad hoc injects, which are additional pieces of information developed during the exercise to advance, slow, or redirect exercise play. Players often make unanticipated decisions, and the lead facilitator must be able to respond swiftly to these in line with the exercise objectives.

She or he can be assisted by other facilitators who will be assigned to specific injects of the scenario and/or who will control the flow of participants’ interventions.

* **Lead evaluator** (this function may or may not be carried out by the lead facilitator): While an exercise can have several evaluators during the actual exercise, the lead evaluator is a member of the planning team throughout the exercise development process. The lead evaluator should be an expert on the subject of the exercise, but also good at writing reports and data analysis. The lead evaluator develops the evaluation strategy, coordinates the tasks of other evaluators, and works closely with the facilitator and the exercise manager to lead the debriefs and produce the first draft of the exercise report.

In addition to the above roles, additional roles can be identified and assigned to people if required. Staff can be assigned to more than one role if needed.

* **Subject matter experts:** subject matter experts contribute to the development of the scenario and injects, and verify that the events depicted are likely to provoke the expected response(s). It is possible that some subject matter experts may not be members of the planning team for the duration of the project, but may only contribute to the scenario.

Subject matter experts may also act as evaluators, facilitators and role players during the implementation phase.

* **Logistics:** Logistics means the arrangement of facilities, rooms and resources for the exercise. This function can be carried out by one or more people.
* **IT support**: this function ensures that all IT equipment and processes needed by the exercise management team are available and working. Smooth operation of IT equipment (projector, sound system, live translation services, etc.) during the exercise is critical to its success. This function can be carried out by one or more people.
* **Secretarial/administrative support:** the secretarial, or administrative, support function works closely with the exercise manager and the logistics and IT support staff. This is the section of the planning team that sends invitations to participants, oversees the production of exercise materials (printing, copying, etc.), arranges and takes minutes of planning team meetings, and distributes internal communications materials about the exercise (putting up posters, emailing newsletters, etc.). This function can be carried out by one or more people.

1. **Additional advice**

* Ensure everybody is aware of their roles & responsibilities.
* Ensure constant communication within the exercise management team (this is very important!).
* Have regular “check-in” meetings to ensure everyone is on track, up to date and aware of progress, issues and/or changes.
* Work as a team. All those involved in developing and running the exercise should support one another in delivering the project. All staff should communicate once tasks are completed, or if there is a challenge to solve.
* Look for solutions - find ways through challenges.
* Be flexible. Adapt to the situation, remember WHY the exercise is being run and keep the project moving forward.