**FX17 Exercise Handbook Template for participants & exercise management team**

*Depending on the exercise objectives, an exercise handbook should be provided to the exercise management team, and potentially to exercise participants, in advance of the exercise.*

*The handbook should be accompanied by any necessary pre-reading and should provide all the information that participants or staff members require in order to take part in the exercise.*

*The handbook should also be accompanied by all the exercise documents that management team members require for the exercise, including the exercise evaluation material.*

*The handbook for the exercise participants differs from the exercise management team handbook in that the latter will include additional information, particularly on the exercise scenario, expected outcomes and evaluation material. The exercise management team handbook is an expanded version of the participant handbook accompanied by exercise documents that the management team members require to manage the exercise.* *In addition to the participant content, the exercise management team should also receive a copy of the exercise management team TOR, final exercise scenario, inject matrix (MEL), and full inject pack.*

## Template

Title: Participant & exercise management team handbook for [**NAME**] FX

[**COUNTRY**]

Date of exercise: [**DD/MM/YYYY**]

1. **Handbook introduction**

The purpose of the handbook is to describe the reader’s role (participant or exercise management team member) during the exercise; the relevant rules and guidance; and any other necessary information on the exercise and how it will unfold.

*Suggested content:*

*This Handbook is intended to assist the participants and the exercise management team in [NAME] [TYPE OF EXERCISE], [COUNTRY]. It provides information about the [TYPE OF EXERCISE] (background, purpose, scope, objectives and scenario, if applicable); exercise roles and responsibilities; exercise rules and guidance; the agenda; and information on administrative arrangements.*

1. **Overview**

**Background, purpose, scope and objectives**

Provide a brief overview of the exercise, including the purpose, scope and objectives.

*Suggested Content:*

***2.1 Background***

*A FX is planned in [COUNTRY] on [DATE (TBC)]. The exercise is being developed and implemented by the XXXX and the [COUNTRY] Ministry of Health (MOH).*

***2.2 Purpose***

*The purpose of the FX is to practice and train the operations and/or functions of [NAME].*

***2.3 Scope***

*The exercise is a FX for [NAME OF OPERATION OR FUNCTION]. It will be conducted in [LOCATION] with [NAME OF TEAM OR ORGANIZATION].*

***2.4 Objectives***

*The FX’s objectives are:*

*1.*

*2.*

*3. Etc.*

**Exercise participants**

Insert a brief description of who the exercise participants are.

**Scenario, if applicable**

Insert brief description of the scenario, if applicable.

*Suggested content for participant handbook:*

***3.1.1 Example of purpose***

*The purpose of this simulation exercise is to practice a timely, effective and coordinated response to a major health event in [INSERT COUNTRY]. The simulation will focus on the function of the EOC and the key areas of information sharing, coordination and decision-making.*

*This exercise is an opportunity to test and improve public health emergency response plans and systems. Your evaluation of these systems will be critical to the outcome of this exercise and will contribute to improved readiness for the future.*

1. **Roles and responsibilities**

Insert brief descriptions of the roles and responsibilities of the exercise management team, including:

**Exercise director:** provides strategic oversight and direction for the planning, conduct and evaluation of the exercise. Responsible for approving the aim, objectives and supporting documentation, including the concept document, exercise plan and exercise instructions.

**Exercise controller/Lead controller**: appointed by the exercise director(s). Responsible for selecting and appointing people to the functions required to conduct the exercise. The lead controller is responsible for:

* + Leading the exercise control team
  + Managing all exercise conduct activities to ensure adequate opportunities to achieve the exercise objectives
  + Managing the master schedule of events list (MSEL)
  + Contributing to the post-exercise report
  + Safety and risk management during the exercise in accordance with the approved plans.

**Exercise control team:** the exercise control team (facilitators) reports to the lead controller and is responsible for:

* + Overseeing the conduct of the exercise
  + Monitoring activity to ensure that the exercise’s aim and objectives are met
  + Simulating activities not performed by the participants
  + Delivering injects and responding to participant requests during the exercise.
  + Acting as first point of contact for any questions, clarifications or requests.

**Evaluators:** responsible for observing and recording the responses of players during the exercise, and evaluating effectiveness based on the exercise aim and objectives. The lead evaluator reports to the exercise director and supports the participants during the exercise debrief.

**Observers**: observers have no official role in the conduct of the exercise. Observers are usually are key supporters (e.g. donors) who wish to see the response system in action.

**Administrative & logistics support staff**: responsible for supporting administrative and logistic functions during the exercise.

*Suggested content:*

*Different people have different roles and responsibilities during a FX. The following table describes the functions, roles and responsibilities of individuals during the FX.*

*[TABLE]*

1. **Rules and guidance**

Insert rules and guidance for the exercise.

*Suggested content:*

***Role of the controller***

*In addition to ensuring the smooth running of the exercise and debriefing, the controller will coordinate the actions of participants in order to achieve the exercise objectives. To this end, the facilitator will not provide instructions on participant tasks, but instead will provide information to trigger participants’ actions.*

***Your role***

*There are no ‘role plays;’ you must play yourself based directly on the functions for which you are responsible in your organization. Respond as you would during a real outbreak.*

***Your response should be based on country-specific data***

*Establish the basis for your response based upon country-specific details (e.g. local laws, customs, prevention and response capacity); data that you have on hand (such as the national response plan); and other information about the country.*

***Consider all information you receive as true; as ‘fact’***

*For the purposes of the exercise, any data that you receive from the controller is to be considered correct, true, or ‘fact’. Please do not challenge the scenario during the course of the exercise. Gaps and contradictory messages may occur, mirroring the complexity of information in a real event. If you have any questions, please ask.* ***Do NOT create additional fictional scenarios. Use the data presented in the exercise***

*The information you will receive throughout the exercise will give you ALL the data you will need. Do not invent numbers, figures etc. unless asked to project figures forward. Do NOT invent additional scenarios that are not in the exercise.*

***ENDEX***

*At the end of the exercise, we will announce “****ENDEX****.” this will signal that the exercise phase is over and we will transition into the debriefing section of the exercise. The debrief workshop is the most important part of the exercise. Taking part in the debrief is an essential part of being a participant.*

***Injects***

*Participants will be expected to act on injects that the facilitation team input into the exercise. Injects can be delivered via—for example—email, phone, SMS and role-playing by actors. Participants are expected to work with other participants to respond in accordance with standard operating procedures (SOPs) and emergency response plans/systems.*

*Participants are also able to contact the exercise control team via the designated phone and email channels to speak with anyone not participating (facilitators in the response cell team will role play the relevant person/agency/organisation for you).  
  
“[INSERT SAFE WORD]” is the safe word to stop the simulation - due to a real emergency or as instructed by the control team.*

*Good luck and enjoy the exercise!*

**Time**

If time jumps are used, describe these.

Suggested content:

***Example of discussion of time***

*The simulation exercise will be running in simulated time (1hr in actual time is 3hrs in simulated time) to allow us to play two full days in the time we have.*

*Morning session: [insert focus ]*

*Time jump at midday (actual time) = from Day 1 evening to Day 2 morning (simulated time)*

*Afternoon session: [insert focus]*

**Exercise communications**

Insert a diagram to explain the communication setup for the exercise. This should include the communication channels used and how to use them.

***Example of communication instructions***

***Closed Exercise: Please ensure that all communication stays within the simulation participant list and includes "\*\*EXERCISE ONLY" clearly visible in the subject header and at the beginning and end of all message content.***

***Please do not contact or engage people outside of the participant list.***

***Phones***

*Participants will use their normal work phones to call or message exercise participants or the exercise switchboard [INSERT PHONE NUMBER]. Please make sure you are calling the right number: the switchboard is dedicated to the exercise only. If calling another participant, introduce the call with the line “Hello, this is an exercise only...”*

***Phone call example***

*FACILITATION TEAM: “Hello, this is the simulation switchboard. How may I direct your call?” PARTICIPANT: “Hello, this is the [XX]. Please may I speak with the Chief Medical Officer, Ridge Hospital?”   
FACILITATION TEAM: “Sure, I will direct your call.”*

***Emails***

*The facilitation team will be emailing you from the following email addresses:*

*[INSERT EMAIL ADDRESSES]*

*Please copy whosimex.log@gmail.com in all emails.*

***Email example***

*FROM: EOC Incident Commander (xxx@gmail.com)  
TO: [facilitation.team@gmail.com]  
CC: whosimex.log@gmail.com  
SUBJECT: Needs Assessment requested. \*\*EXERCISE ONLY CONTENT:*

***\*\*EXERCISE ONLY*** *Attention: Minister of Health*

*Dear Sir,*

*Please find attached a copy of the summary report requested.*

*Best,*

*Robert*

*\*\*EXERCISE ONLY*

1. **Administrative arrangements**

Provide an overview of the administrative arrangements. This information is also covered in the participant invitation.

*Suggested content:*

***Examples of administrative arrangements***

*Exercise schedule, including briefing, debriefing, meals and refreshment*

*Exercise location, accommodation and transport*

*Security*

*Contact information*

*Other information as required.*

*A briefing for all exercise management team will be held on [DATE] at [LOCATION].*

1. **Exercise report**

The post-exercise report (or after action report) will be completed by the lead exercise controller/evaluator, and will provide feedback to participating organizations on the outcome of the exercise.

*Suggested content:*

*The exercise management team should prepare an exercise report describing, analyzing and deriving lessons from the exercise. It should be provided to senior-level authorities of the participating organizations.*

1. **Contact information**

This paragraph includes all the contact information for the participants and the exercise management team.

*Suggested content:*

|  |  |  |  |
| --- | --- | --- | --- |
| ***Exercise management team*** | | | |
| ***Role*** | ***Name*** | ***Location*** | ***Contact No.*** |
| ***Exercise director*** |  |  |  |
| ***Exercise controller*** |  |  |  |
| ***Evaluators*** |  |  |  |
| ***…*** |  |  |  |
| ***Observers*** |  |  |  |
| ***…*** |  |  |  |
| ***Participants*** |  |  |  |
| ***…*** |  |  |  |