

## Pre-Incident Planning Meeting Checklist

# Planning Checklist: Steps to Holding a Pre-Incident Planning Meeting

### Purpose

The Pre-Incident Planning Guide describes a step-by-step process for planning and holding a local pre-incident planning meeting. This tool summarizes the steps and provides checklists to assist meeting planners in measuring their progress and documenting their decisions.

### Instructions

Please see the Pre-Incident Planning Guide for more detailed information about each step in this summary.

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### Planning Checklist

1. Identify the individuals who will serve as point persons for planning the meeting and managing logistics. See the guide for more information about these roles.
  - ☐ Planning team leader: \_\_\_\_\_
  - ☐ Logistics organizer: \_\_\_\_\_
2. Identify appropriate individuals to serve as a planning team for the pre-incident planning meeting, in addition to the planning team leader and logistics organizer.
  - ☐ Team member: \_\_\_\_\_
  - ☐ Team member: \_\_\_\_\_
  - ☐ Team member: \_\_\_\_\_
3. Hold a planning team meeting to:
  - ☐ Adopt an agenda for a pre-incident planning meeting.
  - ☐ Identify individuals to serve as speakers and discussion facilitators.
  - ☐ Identify participants to invite to the pre-incident planning meeting.
  - ☐ Determine how best to use the local information tools.
  - ☐ Set a date and location for the pre-incident planning meeting.
4. Confirm the participation of the individuals identified as potential speakers and discussion facilitators.
5. The logistics organizer should confirm the date, location, and other logistics, including:
  - ☐ Room set-up: The arrangement should allow for presentations, but also promote group discussion.
  - ☐ Audiovisual equipment for a PowerPoint presentation.
  - ☐ Flip charts and markers for facilitators or participants to make notes during group discussions.
  - ☐ Arranging for copying of handout materials.
  - ☐ Other: \_\_\_\_\_
  - ☐ Other: \_\_\_\_\_
6. Invite the participants.
7. Hold the pre-incident planning meeting.