



Matrix
Academy Trust
EDUCATION WITHOUT EXCEPTION

SMART Response®

DRILLS & EXERCISES

LEVEL 4 DRILL

Training module for leaders, site teams and incident response roles

Purpose: rehearse the response, test the system, learn safely.

Exercise — not a simulation of violence



What candidates should be able to do

1 Recognise Level 4

Explain when SMART Response® moves to a full site response and what the whole-site alert means.

2 Perform the response

Demonstrate the expected actions for classrooms, communal areas, leadership and site teams.

3 Operate command

Apply Gold, Silver, Bronze, Chief of Staff and Scribe roles with disciplined information flow.

4 Observe & evaluate

Use evidence, timings and role performance to identify what worked and what failed.

5 Improve the system

Turn the debrief into actions, owners, deadlines and a planned re-test.

Success is not “everyone hid”. Success is a coordinated, proportionate and testable response.

LEVEL 4: Full SMART Response®

SERIOUS + IMMEDIATE

The threat is inside a school building or on site or cannot be isolated to one area.

Cue: “Code Grey.”

The Alert beacon system then notifies the whole site of a full SMART Response®.

1. Assess

A live risk assessment and the phased level approach come first.

2. Escalate

If the threat cannot be isolated, move to Level 4.

3. Command

Silver and Bronze procedures operate while the site adopts the full protective response.

The drill must test the levelled approach — not bypass it.

A good drill is controlled, credible and measurable

✓ CONTROLLED

A named Exercise Director controls start, injects, pauses and termination. Real incidents always override the exercise.

✓ CREDIBLE

Use realistic information and time pressure, without introducing unnecessary distress, surprise or simulated violence.

✓ MEASURABLE

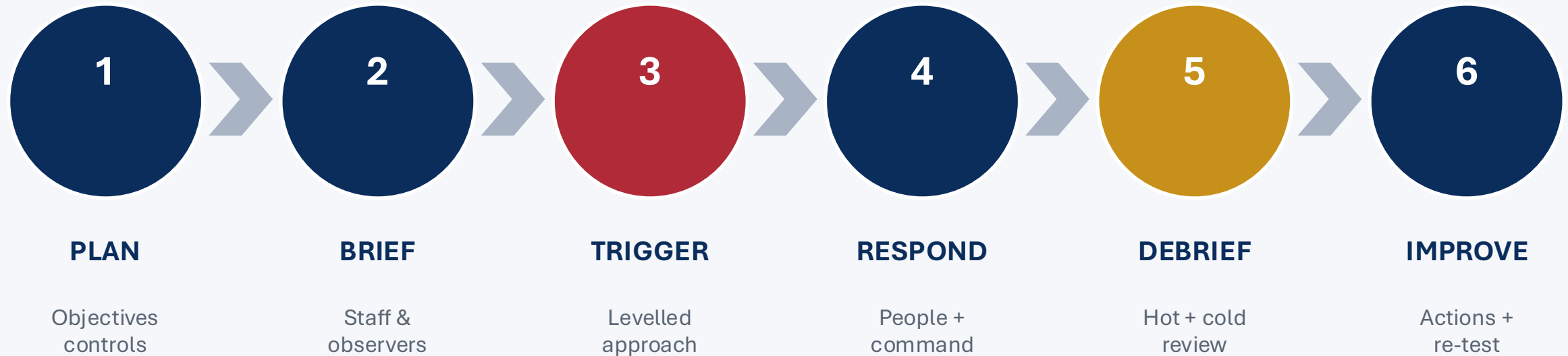
Pre-agree what observers will record: activation, movement, securing rooms, accounting, communications and command.

✓ LEARNING-LED

The objective is to expose weaknesses safely and improve the procedure — not to “catch people out”.

Brief the exercise. Test the response. Debrief the system.

The Level 4 drill cycle



Do not stop at the drill: the improvement and re-test stages complete the learning cycle.

Before the drill: define exactly what you are testing

- Exercise objective: e.g. “Can the site move from an emerging threat to Level 4 and establish effective command?”
- Scope: whole site, selected building, selected phase, or leadership/command element.
- Exercise Director, safety controllers, observers and communications route.
- Start conditions, exercise cue, planned injects, end condition and emergency stop phrase.
- Known vulnerabilities: visitors, contractors, SEND, toilets, sports areas, external classrooms, break/lunch, lettings.
- Evidence to collect: times, decisions, role actions, communication accuracy and physical response.

Avoid “perfect conditions”

A drill should test realistic friction — but never manufacture unsafe conditions.

One main objective

Too many objectives dilute the learning. Pick a primary question and a few supporting measures.

Agree stop conditions

Everyone controlling the drill must know how it will be paused or terminated immediately.

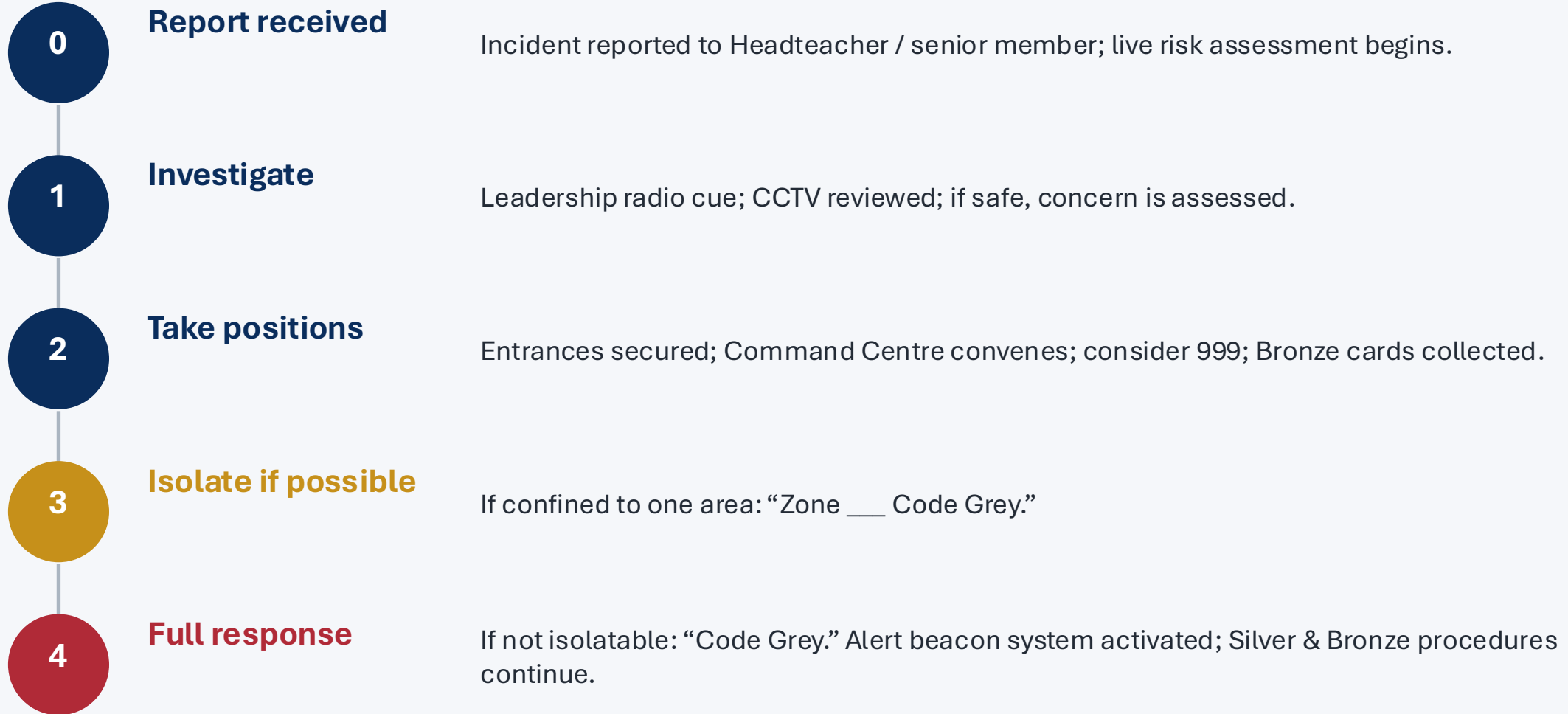
Briefing: candidates must understand the rules of the exercise

- State that a drill will take place and identify any groups who require additional preparation.
- Reinforce the SMART Response® alert, Level 4 cue and expected protective actions.
- Remind staff: only recognised/trusted senior staff or emergency services give further instructions.
- Confirm how real emergencies will be distinguished from exercise traffic.
- Observers observe — they do not coach unless safety requires intervention.
- Reinforce welfare arrangements and how concerns can be raised after the exercise.



Never allow exercise realism to create ambiguity about a real emergency.

How the exercise should escalate



Observer question: did the decision to reach Level 4 follow the information available at the time?

What should happen across the site at Level 4

MOVE

Collect pupils / move into a room immediately. Corridors, toilets and communal areas should clear.

SECURE

Stay in the room; close and, where possible, lock windows and doors; block the door with readily available heavy items.

ACCOUNT

Account for pupils in your care and keep the group together.

REDUCE VISIBILITY

Lights off; blinds/curtains closed; pupils silent and positioned out of sight as far as possible.

COMMUNICATE

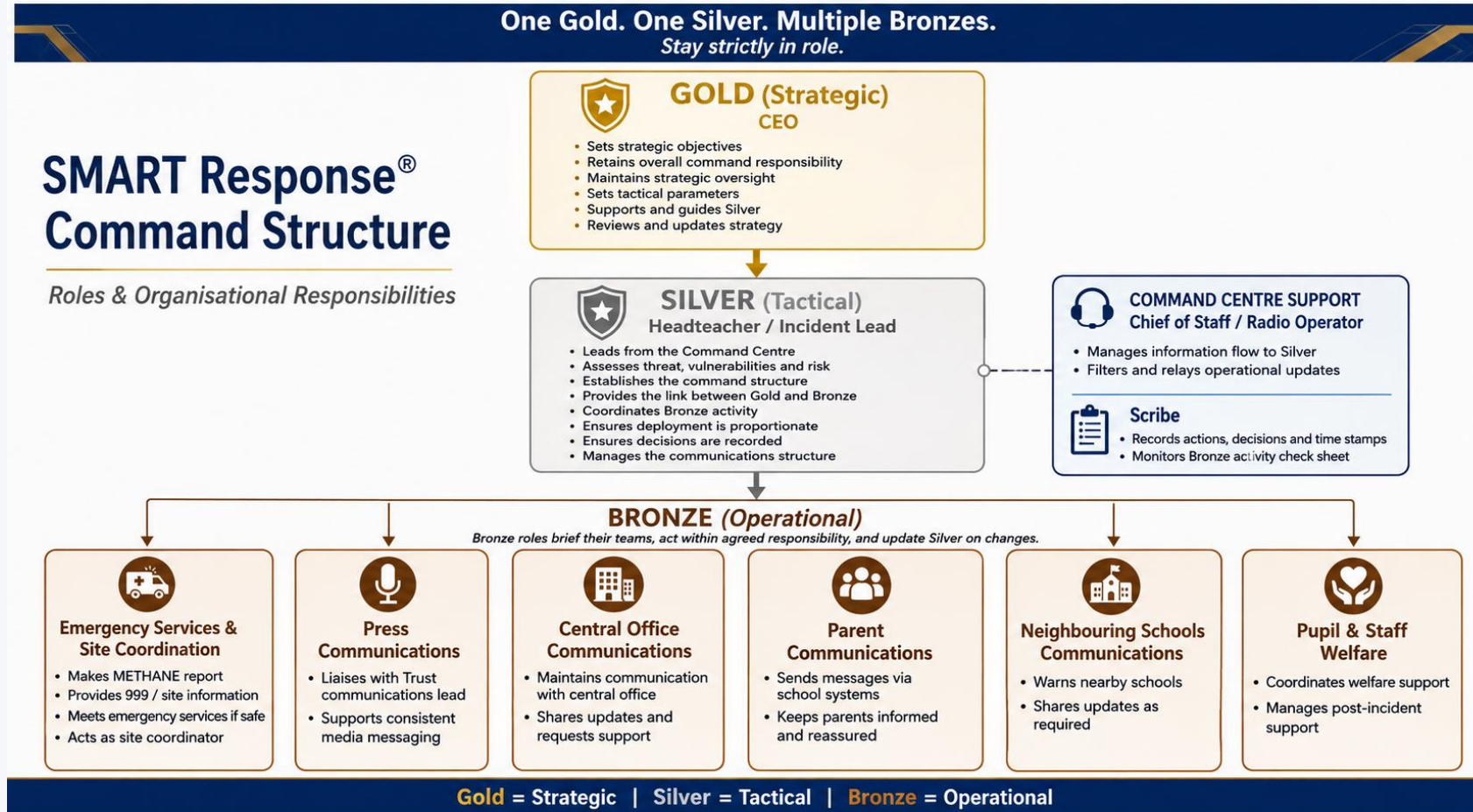
Follow further instructions only from recognised/trusted senior staff or emergency services. Use mobile phones only when necessary to relay developing information.

HOLD

Remain secured until the all clear is received.

During the drill, observers assess behaviour against the procedure — not individual personalities.

Command must operate while the site is secured



Role discipline matters: one Gold, one Silver, multiple Bronzes — each staying within role.

Inside the Command Centre

SILVER

Assesses information, evaluates threat/vulnerability/risk, establishes the command structure, stays in the Command Centre and coordinates Bronze plans.

CHIEF OF STAFF / RADIO

Acts as Radio Operator and manages the flow of information to Silver, filtering where necessary.

SCRIBE

Records what happens, what is said and the time; monitors the check sheet for Bronze activity.

- Can Silver maintain tactical command rather than becoming operational?
- Is information filtered and prioritised rather than simply passed on?
- Are decisions and rationale time-stamped?
- Are Bronze updates coordinated into one tactical picture?
- Is Gold updated without Gold taking over Silver's role?

A quiet site with a chaotic Command Centre is not a successful Level 4 response.

Bronze: operational responsibilities under pressure

Emergency services

METHANE report; 999/site information; if safe, meet emergency services and act as Site Coordinator.

Press communications

Liaise with the Trust communications route and support consistent external messaging.

Central Office

Maintain communication with central office and share updates / requests for support.

Parent communications

Use the school messaging system to provide appropriate parent updates.

Neighbouring schools

Notify neighbouring schools and share updates where required.

Pupil & staff welfare

Coordinate welfare issues and the post-incident support requirement.

Observer focus: clear understanding of the Gold strategy + Silver plan + own functional limits.

Bronze acts within agreed responsibility and updates Silver when circumstances change.

Example Level 4 exercise

STARTING INFORMATION

Reception reports an unidentified adult has entered the site and cannot immediately be accounted for. Their intent is unknown.

INJECT 1

CCTV provides a possible location, but the person moves out of view.

INJECT 2

A staff member reports seeing someone matching the description in a different internal area.

INJECT 3

Information is now conflicting and the threat can no longer be reliably isolated.

INJECT 4

After Level 4 activation, a Bronze reports a pupil group was in a communal area at the time of the alert.

INJECT 5

Emergency services request METHANE/site access information and an accurate current picture.

No weapons, actors, fake injuries or surprise confrontation are required to test the Level 4 system.

Observer checklist

ACTIVATION

- Was the level correctly identified?
- Was the cue clear?
- How long to full alert?

SITE RESPONSE

- Corridors cleared?
- Rooms secured?
- Pupils accounted for?

COMMAND

- Command Centre established?
- Roles allocated?
- Silver stayed tactical?

COMMUNICATIONS

- Radio discipline?
- Accurate messages?
- Bronze → Silver updates?

RECORDING

- Times captured?
- Decisions + rationale?
- Missing actions identified?

WELFARE

- Any distress?
- SEND/access issues?
- Post-drill support needed?

Record what happened — not what you think should have happened. Evidence first, interpretation second.

Exercise safety and termination

STOP THE EXERCISE

Immediately if:

- A real emergency occurs
- A participant becomes unwell or distressed
- A safety control fails
- Exercise messages create confusion
- The Exercise Director judges continuation unsafe

Real emergency overrides exercise

Controllers must have a pre-agreed method to distinguish real operational traffic from exercise traffic.

Do not improvise hazardous realism

The learning comes from command, communication, movement and decision-making — not from shock tactics.

Welfare is part of readiness

Build in post-drill support and a route for staff or pupils to raise concerns.

Debrief in two stages

HOT DEBRIEF — immediately

Ask:

- What happened?
- What worked?
- What was difficult?
- Where was information lost?
- Were roles clear?
- Did anyone feel unsafe or unsupported?

Capture facts while they are fresh.

COLD REVIEW — after evidence is collated

Review:

- Timings and observer records
- Command log and decision rationale
- Communications and Bronze activity
- Physical/site vulnerabilities
- Welfare and accessibility issues
- Policy / training / equipment changes required

Debrief the system, not the person. The question is: “What made the right action easier or harder?”

Convert learning into an improvement plan

Finding	Action	Owner	Deadline	Evidence / Re-test
Alert not audible in external room	Review alert coverage / local procedure	Site	2 wks	Retest area
Bronze updates overload Silver	Re-brief Radio Operator filtering protocol	DHT	1 wk	Tabletop test
Visitor accountability unclear	Revise reception / visitor process	Ops	3 wks	Next drill
Decision log incomplete	Scribe refresher + check sheet rehearsal	HT PA	1 wk	Command exercise

A finding without an owner and re-test date is only an observation.

LEVEL 4 DRILL

The standard we are aiming for

- ✓ The threat is assessed — not assumed.
- ✓ Escalation is proportionate and timely.
- ✓ The site responds immediately and consistently.
- ✓ Silver commands; Bronze delivers.
- ✓ Information is filtered, recorded and acted on.
- ✓ The exercise ends with learning, ownership and re-test.

“Test the procedure. Learn from the evidence. Improve the response.”