



Virtual Exercise Early Experiences, Best Practices and Lessons Learned
Pacific States-British Columbia Task Force
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Introduction

As plan holders and agencies began in early 2020 to manage responses and planning work under federal and state guidelines for COVID-19, evaluating and participating in oil spill drills virtually has become a new practice. These drills will typically involve a small in-person component to avoid congregation, with additional players and evaluator working virtually through a meeting and document sharing platform.

The Task Force developed this document summarizing the “Early Experiences, Best Practices and Lessons Learned” gained to date. Because of the COVID-19 restriction, in a short period of time responders have come a long way in showing how virtual response can be managed and the investment it takes to make it work successfully. Some elements of virtual drill and response participation are likely to remain post-COVID-19.

Drill Design

Designing drills will likely take more time when they will be held virtually; there are more details and considerations to discuss such as:

- the expected linear process of the drill and order of actions so expectations can be shared with virtual participants and evaluators;
- agreement on the virtual platform and consideration of training ahead of the drill in particular for a larger drill;
- a plan to manage unexpected technology issues.

Managing the virtual experience for both remote and in-person participants

- Managing the experience for virtual drills needs to be done with careful planning and intention.
Consider adding a position for general overall facilitation of the drill and/or for technology problem-solving for drill participants.
- Over-communicate exercise activities to participants. The exercise is on display for a large number of staff and the ability to ask questions, view documents, attend meetings or see activities needs to be managed.
- Some activities such as notifications may need to be narrated by the player in order for virtual evaluators to follow. Put phones on speaker function so both sides of the phone call can be heard.
- Make announcements or use the chat function about milestones, meetings and decisions, to keep continuity and engagement.

Be prepared to invest extra time preparing drill participants on the virtual platform for meetings, drill play and document development and management. A best practice is to have a



training ahead of the drill and to spend extra time before the start of the drill reminding players of ground rules and navigation.

If one screen is used to display the main play space in smaller drills, it is helpful to allow people to work for a period of time, then conduct Command Post tours to show what is in the play space showing observers/evaluators a closer view of documents and displays. For larger drills, having multiple “channels “ or chat rooms for play is best especially when on-site players are spread out to maintain social distance, or for larger drills.

It’s a best practice for participants to join the virtual platform early to avoid last minute stressful issues with logging on.

Create the tools for success – consider developing a handout on virtual meeting etiquette and process; for example using the “raised hand “ feature to ask questions, or when to keep a phone line muted or on.

Dry Runs to work out the bugs before the drill

It is a best practice is to conduct a dry run with evaluators and participants prior to the drill.

- Can everyone access the links to the meetings and document sharing platform?
- Practice using chat and “hand raising” to ask questions.
- Practice muting and unmuting.
- Practice navigation including moving between channels or rooms, and to document locations.

Variety of Platforms for Video, Audio and Document Sharing

Depending on the complexity, virtual participating can be simple (over a conference phone) or much more complicated using a number of commercially available platforms. There is a challenge across the board in both access to and training on the variety of available virtual platforms. Some agencies or companies have fire walls that limit their ability to connect virtually (e.g. the Coast Guard).

Microsoft Teams has been the predominate technology used by most plan holders, though it is not the only option available and tested. It can be set up with a main play space room (channel), and multiple breakout rooms (channels) for separate Section work, meetings and document sharing. It allows players to toggle back and forth, but can be complicated to navigate if a lot of channels are set up.

It’s a best practice to label the channels with forethought to make it easier to navigate, such as “UC Meeting Room” or “Operations Section” distinguishing between general work and meeting areas.



Ability to share documents - some plan holders have developed a share point site for document sharing together with the virtual meeting platform. This means there needs to be an ability to share outside the firewalls of a company or agency.

Technology and Tips

A chat function is invaluable to communicate with facilitators, evaluators, players and observers.

In a virtual drill it is difficult to know who is talking at any given moment. If the platform allows for this, assign the ICS position to the name of the participant. Label the screen views by position for easy reference (Unified Command, Operations, Safety, etc.).

Bringing the “field” into the command post virtually

“Live streaming” from the field to a command post can greatly enhance a tabletop drill, provided it can be done safely. Using video to provide real-time activities such as safety briefings or equipment deployments can bring realism to the drill or a response. Plan holders have invested in this capability under the restrictions of COVID-19.

- Remote viewing of field activities can show command post participants the conditions of the day in order for them to evaluate the fate of the oil and further enhance drill play.
- Use of drones can be invaluable and provide more acute observation of response activities than otherwise (such as overhead view of skimming operations).

Evaluating Drills Virtually

Evaluation of drills can be done virtually, although additional evaluators may be needed to manage in a virtual environment.

Agree ahead of time how evaluators will interact with the drill players or the Exercise Coordinator. Be sure it’s clear how to interact in a drill.

There is a likelihood in a virtual environment that evaluators may miss observations of play at times. For an evaluated drill, the plan holder should be prepared to provide documentation in case that every drill action was not observable.

State and Provincial coordination

One benefit of the 2020 experiences has been the coordination and cross-participation between states and plan holders on virtual drills, for example inviting other states and provinces to observe each other’s drills. These opportunities provided by plan holders has benefited task force members and is much appreciated.

Improving / Lessons Learned

Consider surveying participants after the drill in order to improve the tools and training.



Continue conducting these virtual drills to improve user knowledge with technology and communication. We are all on a learning curve together.

Use this as an opportunity to prepare for a real spill incident.

Think about how the future of response and how virtual play may be incorporated – what ICS positions are best suited for virtual play? Which need to congregate in person? How will technology improve to support this virtual approach?