

## Lessons Identified Virtual EOCs and IMTs



### Background

- OSRL has moved its Emergency Operations Centres in Southampton and Singapore to be able to operate virtually.
- Through our engagement with Members and stakeholders, we have discussed how a spill response would be managed taking into account COVID-19 distancing and other safety measures.
- We have also participated in a number of exercises and drills with Members to practice and test how virtual Incident Management Teams would work.

**This document outlines a number of lessons relating to the above which we have identified as relevant and useful to Members.**

We welcome input and feedback from Members and Stakeholders who have identified their own lessons in these areas and will re-issue this document periodically to share these. Please contact Dan White ([DanielWhite@oilspillresponse.com](mailto:DanielWhite@oilspillresponse.com)) or Hon Phui Hang ([HonPhuiHang@oilspillresponse.com](mailto:HonPhuiHang@oilspillresponse.com)).

Note on terminology:

OSRL defines training as structured learning, an exercise as deliberate practice, and a drill as a test.

Serial #	Lesson title	Context	Recommendations / considerations
01	Selecting an appropriate platform, setting it up and ensuring it fits the needs of the responders and the response	<p>Various platform such as WebIAP, MS Teams, Skype, OneNote, Zoom, Webex and WeChat / WhatsApp are used for virtual IMTs / Exercises and communication.</p> <p>During one Member exercise, Microsoft Teams was used as virtual platform involving various internal and external stakeholders. Several observations were made:</p> <ol style="list-style-type: none"> <li>A number of participants joined late due to difficulty accessing Teams (Primarily administrative restrictions on their company hardware).</li> <li>Only one screen can be shared at a time which lead to multiple screen switches during the meetings.</li> <li>Participants joined a call via a link. Because of this set up, there was no mechanism for retaining the information shared by external stakeholders if shared via screen shared during the meetings. Feedback during debrief was given and captured verbally. The notes kept by IMT were not shown on screen.</li> </ol>	<ol style="list-style-type: none"> <li>For exercises provide instructions prior to the exercise to ensure that participants have credentials and access to the necessary software in advance. For spill/drill scenarios it is beneficial to ensure and test that there are robust procedures in place to provide access and credentials quickly during an incident.</li> <li>There is a risk that if standard sharing mechanisms are limited that people take a path of least resistance and share information via screen shots, email, WhatsApp and other means.</li> <li>Microsoft Teams works well in OSRL's experience. It is a tool that many companies use for day to day working, which has the advantage that people are familiar with how it works and don't need to learn a new system. It integrates calls, conversations (multiple via channels), document collaboration and has additional tools that may be used during an incident or exercise.</li> <li>We recommend establishing a MS Teams Site or specific channels and adding exercise/drill/spill participants as members to leverage the collaboration tools, the in-built ability to assign and track actions, and the ability to share and collaborate on files via SharePoint. Simply using Teams as a platform for calls and relying on screensharing does not allow for the full benefits of the system to be leveraged.</li> <li>Web IAP and other dedicated tools have benefits, though the learning curve can be high if they are not used regularly by participants.</li> </ol>

Version:	1 – LIVE DOCUMENT	Date updated:	1 May 2020	Doc owner:	Dan White, Hon Phui Hang
Document Number: OSRL-OPER-REP-00363 Page 1 of 3					

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02	Establishing appropriate protocols for formal and informal communication	Communication needs to be managed more carefully when working virtually. Maintaining a good communications protocol is essential to ensuring that key information is distributed, and non-essential chatter is kept to a minimum.	<ol style="list-style-type: none"> <li>1. The following points are essential to developing a communications protocol               <ol style="list-style-type: none"> <li>i) What types of information should be communicated and by what means?</li> <li>ii) What factors affect this? (Legal discoverability, data retention, data security and sharing etc.)</li> </ol> </li> <li>2. Incorporate introductions from all locations into daily / operational routine.</li> <li>3. Ground rules clearly explained at the start of the call (e.g. Everyone on mute unless something being said, made known to others of your name and position before speaking etc)</li> </ol>
03	Situational awareness and common understanding	Maintaining situational awareness in the virtual IMT is more challenging. Participants reportedly found it more challenging to maintain common understanding over a sustained period.	<ol style="list-style-type: none"> <li>1. Careful scene setting and sharing of relevant documentation are vital at the start of the exercise and throughout – detecting and correcting misunderstandings and clarifications is more challenging when working virtually. More frequent and well structured time-outs may help.</li> <li>2. An induction / orientation process for remote participants who join after the start avoids disruption to the flow of the exercise. Where a participant is taking over from someone else this can be combined into a handover. A benefit of an effective virtual IMT platform is that documentation and historic conversations are available for new participants to read ahead of time.</li> <li>3. Need to establish someone to be present throughout calls to ensure bottlenecking does not occur when participants need to break out to update / brief others. The use of liaisons positions in each section can support this</li> <li>4. Planning and scheduling breaks will allow participants to manage workload appropriately whilst avoiding disruption to the flow of the exercise. The schedule of meetings / calls / breaks should be visible to all in a prolonged exercise / drill / event.</li> <li>5. It is useful if the technology employed allows for video, voice-only and text – in addition to collaboration on documents/virtual whiteboards.</li> </ol>
04	Fit for purpose IT	IT challenges can “make or break” IMT’s ability to support response. Poor broadband/signal individual IT issues such as laptop crashes will limit effectiveness and contribution.	<ol style="list-style-type: none"> <li>1. Plan for when IT issues happen not if they happen. Considering the number of people involved in a remote IMT it is inevitable that there will be more frequent IT issues than in a face to face IMT – and resolving issues is likely to be more complex and take longer.</li> <li>2. For exercise / drills / incidents over multiple countries, give consideration to the location of the participants and the capability of the infrastructure where they are joining from. In particular if they are joining from a field location. Considerations include providing a mechanism for back up dial-in numbers, audio calls, detailed meeting minutes after meetings.</li> <li>3. Build redundancy into your IMT to cover IT failures include deputy section chief, backup liaison officer, second OSRL TA on the main calls as alternates to take over should they encounter IT issues.</li> </ol>

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05	Paying special attention to managing energy, fatigue, concentration, stress, wellbeing.	Recognising the degree of concentration needed is much higher and there is likelihood of individuals overlooking their own wellbeing compared with a face to face environment there are natural screen breaks (meetings, coffee etc)	<ol style="list-style-type: none"> <li>1. Building a structure into the operational cycle that:                             <ol style="list-style-type: none"> <li>a. Ensures people have time to take screen breaks etc (e.g. scheduled breaks).</li> <li>b. Develop wellbeing management guidance.</li> <li>c. Assign a buddy system of checking in with each other or a mechanism for people to indicate if they need support.</li> <li>d. Encourage participants to indicate their availability/status (busy, available) - in a virtual environment it is not always apparent.</li> </ol> </li> </ol>
06	Ensuring there are enough people - facilitation and information management need different consideration.	<p>Taking up multiple roles in an IMT can be distracting and confusing.</p> <p>IMT leader may find it difficult to monitor progress of the tasks being allocated internally to IMT members as well as information shared by external organisations all at the same time.</p>	<ol style="list-style-type: none"> <li>1. Have a dedicated facilitator in a virtual IMT. This enables everyone to focus on their roles allowing IMT Leaders / Section Chiefs to focus on the technical and leadership aspects – which are harder when virtual (rather than the technology).</li> <li>2. Ensure people have alternates who can monitor what is happening whilst they brief a team / take a break, so individuals don't become bottlenecks or attempt to do too much multitasking.</li> <li>3. Consider appointing a document controller (even in exercises / drills / incidents where one may not normally be appointed) or having a clear documentation hierarchy so people can file documents appropriately.</li> </ol>
07	A virtual IMT is still an IMT, the same principles apply	We have participated in some examples where a single, prolonged call is used to for the IMT. This can create bottle necks due to span of control and unclear roles and responsibilities.	<ol style="list-style-type: none"> <li>1. Setup separate calls for the various sections to work.</li> <li>2. Integration of OSRL into each appropriate section significantly increases the support we can provide; however, this can only be maximised once functional calls / channels / groups are established within the incident management framework.</li> <li>3. Planning prior to meetings can ensure that the meeting is efficient with limited switching of screens. Meeting agendas and templates are useful to ensure effective meeting via virtual platforms.</li> </ol>