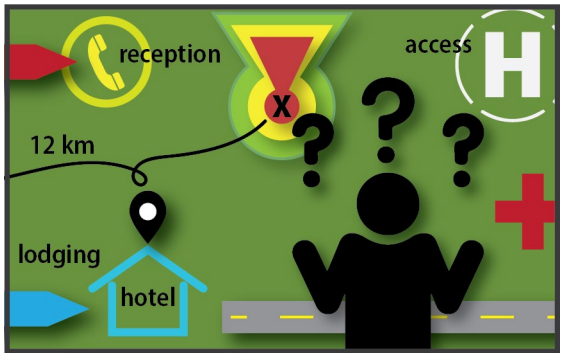
TOOLBOX MEETING GUIDE

TOPIC 11: EXERCISES AND INCIDENT MANAGEMENT: ACTIONS FOR SUCCESS



To manage exercises and incidents successfully, key objectives must be achieved. It is important to recognize our performance is affected by competing demands for our critical thinking skills, which is why the Incident Command System (ICS) sets limits for span of control, and why it is essential supporting resources (such as response plans, checklists, mapping, etc.) are clear, simple, focused and effective.

1. **Establish Your Command:** The Incident Commander (IC) has overall authority. As IC, you should clearly establish command by announcing your role and designating the location of the Incident Command Post. If the incident involves multiple jurisdictions or shared authority, Unified Command may be used and announced. The IC assigns Section Chiefs – and retains direct responsibility for any unfilled roles.
2. **Create Your Response Team:** As details about the incident are discovered, the best practice to establishing control is to 'Get Big Quick'. This can be achieved by:
   I. Prioritizing Command and General Staff role assignments, considering the availability of personnel.
   II. Filling additional roles as more resources arrive.
   III. Ensuring Section Chiefs are able to identify/resource any additional needs in their sections.

   In oil and gas operations, the Operations Section Chief is likely to have the greatest and most urgent need for additional staff to take on roles such as On-site Supervisor, Rovers, roadblocks, contain/control actions, etc. It is far easier to shrink your organization if/when roles are not needed than it is to expand your organization in the midst of the early response to an incident.
3. **Initial Briefing:** As IC, ensure there is common understanding of the challenges and priority actions that must be taken, and clarity on where, when and how information is to be relayed back to you.
4. **Use Your Checklists:** All roles should have their own checklists. For added simplicity, these can be divided into phases of the incident, such as: **Initial Response, Ongoing Response, and Demobilization.** When fulfilling multiple roles, personnel must remember to use all applicable checklists. Keep in mind, not all tasks on a checklist may need to be completed – the incident will evolve and responders should be guided in their actions by the changing conditions.
5. **Establish/Test Your Communications:** The key to successful incident management is effective communication. While cell phones have become a primary communication tool, having and testing a secondary system is essential, especially if areas of poor cell connectivity have been identified. Consider the following:
   - Cell boosters installed in a facility may be affected by a site ESD/power loss.
   - If resource roads are affected, what channels can be used to alert drivers?
   - If helicopters are used, how will your on-site team communicate with the pilot?
   - How do you talk with contract responders, especially if the incident changes while they are on route?
6. **Your Incident Action Plan (IAP):** As IC, create your initial plan with your Section Chiefs. This should only take a few minutes since your understanding of the incident will likely be a "work in progress." For smaller incidents, you

may find you only update your plan a few times, while larger incidents will typically have multiple versions.

i. **Develop Situational Awareness:** This is the first step in developing a comprehensive IAP. Tools that support situational awareness include; site photos, maps, river/streamflow data, weather forecasts, subject matter experts both within and outside your company, and in other agencies.

ii. **Create and Update Your IAP:** Determine your top objectives. These are typically:

- **Responder Safety** – The Safety Officer should identify current and potential risks, review safety data sheets, lock-out/tag out and ESD status, potential sources of ignition (flares, cell phones, vehicles, etc.).
- **Public Protection** – Identify who is at-risk, what needs to happen to remove the risk (or remove people from the risk), how to prevent further people from becoming at-risk, and who needs to be notified.
- **Control and Containment** - Know the product, characteristics, approximate spill volume and potential for additional release, values at-risk (people, environment, infrastructure) and containment priorities.

7. **Get to Work:** Based on the IAP, each role should quickly reference their checklists and begin working on assigned actions. Once responder safety is established, public protection must take place as quickly as possible. Get road blocks and Rovers deployed to the appropriate locations, and bring in a helicopter to rove if unsafe at ground level, or the Hazard Planning Zone (HPZ) is too large. Ensure telephoners are prioritizing calling those impacted by the Hazard Response Zone (residents, business owners, non-resident landowners, trappers, guide outfitters, range tenure holders, etc.) and instructing them to either shelter-in-place, or evacuate. If evacuating residents, ensure a reception centre is established. As previously noted, steps can often be done simultaneously, rather than sequentially. Control and containment of the incident can occur while public protection is being put into place, assuming there are enough responding personnel to fill all roles.

8. **Status Update Meetings:** Managed by the Planning Section, update meetings serve two purposes:

I. Offer a moment for each role to give an update on progress (what has been accomplished, what still needs to be accomplished, and what areas/roles need help), at which time the IAP can be updated.

II. Allow people time to recollect and take a breather. Stress within the team can become overwhelming, especially in the initial stages of the incident management process. These meetings allow everyone to take a short pause and think through what has happened, and what needs to happen.

Status update briefing meetings should take place frequently at the start of an incident when new information continues to flow in at a rapid pace. They may become less frequent once the incident is being managed. Meeting notes and decisions should always be documented, including dates and times. If staff are available, assign a scribe to manage meeting notes and update status boards so the entire response team can see what's happening at a glance.

All Section Chiefs should be ready for these briefing meetings, so setting a specific time is essential. Announce an exact time – "*at 10 a.m.*" rather than "*in fifteen minutes*". To the greatest extent possible for larger incidents, move towards daily set times, ideally scheduled to complement shift changes.

Other worthwhile considerations for exercises/significant incidents:

Use Your Tools: Mark-up maps, create and post action plans and status updates, use resource tracking and position checklists, time and event logs, and review how and where all incident related documentation will be saved.

Review Your ICS Organization: Check your preparedness for an incident that may go on for two or more days and requires constant (24-hour) activity. Look for points of failure, such as having only one person trained in a vital role. Find ways to get effective and skilled assistance before burn-out of staff occurs.

Always Consider the Direction of Risk: Incident Command processes should be practiced so they work equally well for internal threats (e.g. spills and equipment failures) as they do for external threats (e.g. wildfires and extreme weather). Ask how staff may be affected by each. For example, do they have families that need to be evacuated? Are they safe to travel to/from the work site?