



TOOLBOX MEETING GUIDE

TOPIC 10: PURPOSE OF EXERCISES

Why Conduct Exercises?

An exercise is both a demonstration of skills and knowledge acquired through accumulated training offered to responding personnel through the course of the year, and an opportunity to identify areas for improvement. It prepares key staff to respond to hazardous situations and critical incidents, and enables them to react effectively by using familiar tools and procedures.

Exercises should not be viewed as training, although they offer many key learnings as participants may find gaps within their Emergency Response Plans (ERPs), processes, and communications as they navigate through a simulated incident scenario. Each scenario offers the opportunity for personnel to develop further confidence and familiarity with Incident Command System (ICS) roles, subsequently building depth of knowledge and capabilities within their organization.



Table-Top Exercise: The simplest of the exercises, Table-Tops use a facilitated discussion approach, built around a plausible incident scenario that could occur within, or close to a permit holder's operations. Table-Tops build familiarization with ICS roles and responsibilities, ERPs, policies and procedures, and key tools used during significant incidents, such as mapping, ICS forms, and creation of an Incident Action Plan.

Functional Exercise: Functional Exercises are significantly more interactive forms of Table-Tops, providing higher levels of engagement for experienced operators by adding in many key actions of a Full-Scale or real incident, such as testing communications by separating field response personnel from Incident Command Post personnel, scheduling and maintaining regular incident status update briefings, and making real calls to Emergency Management BC (EMBC), government agencies/regulators, and emergency response resources.

Full-Scale/Major Exercise: A Full-Scale exercise involves full activation of an ICS organization, and deployment of field personnel to conduct key actions such as setting up roadblocks, conducting roving operations, and going to the physical location of key assets such as emergency shut down (ESD) and block valves. A Full-Scale exercise should be as realistic as possible, testing key assumptions such as how long staff can work on a single supplied air bottle, or that dispatched staff have the right keys to unlock gates and valves. Similar to a Functional Exercise, all communications processes are used and secondary modes should also be tested.

Tips for a Successful Exercise

- Ensure all participants have a role and an opportunity to contribute. If the group is very large, consider breaking into sub-groups and allow each team to independently work through the scenario, then compare the response actions developed by each group.

- For Functional and Full-Scale Exercises, critical information injects should be provided directly to the person/role expected to discover it – roadblocks may see elevated LEL or H₂S readings, a rover may report a man-down in a remote area, or the Safety Officer may halt an action because of a newly identified risk – each based on a targeted scenario update.
- Vary the scenario and, if possible, base it on a real-life incident. This also leads to an engaged debriefing as the group may want to compare their recommended actions against the real-life situation.
- Adjust the complexity to challenge the skills of the participants. This can be done by having a series of additional injects that can add to the initial problems – such as wind direction shifting, rain moving a spill towards a water body, or issues for wildlife navigating through a hazard area.
- Never train to a specific scenario - train to the procedures and processes that contribute to a successful response to any event.
- Consider the “direction” of incidents. Are they internally generated, such as a line break or loss-of-control well incident, or externally generated, such as a wildfire event threatening fields and facilities, or a malicious act such as valve tampering or a control system intrusion? Taking into account these real-world elements allows teams to consider how they would respond, and supports testing of plans under a range of potential hazards.
- Set expectations for the facilitator. This is your exercise, and no matter how expert the facilitator, they are unlikely to be on-site when an incident occurs. They can provide valuable feedback at the end of the exercise, but should not be piloting responders through the scenario.

Additional resources that may help with planning your exercise:

- [US Chemical Safety Board](#) – The CSB have created animations of a number of major incidents related to oil and gas operations, including wells, storage and processing facilities – clips could simulate an exercise activity. Refer to: <https://www.csb.gov/videos/>.
- [Energy Safety Canada](#) – Safety alerts and bulletins review incidents and hazard conditions that could be included in your exercise.
- Public Safety Canada’s [Critical Infrastructure](#) support pages.
- NOAA’s [Office of Response and Restoration Disaster Preparedness Program](#).