Facilitator Guidebook

Collections Emergency Documentation: A Virtual Tabletop Exercise

Hello and thank you for your interest in facilitating the **Emergency Documentation Virtual Tabletop Exercise**. This activity is intended to be a safe learning opportunity for you and your colleagues to explore ideas and practice implementing a documentation strategy. This activity is one part of a series of Emergency Preparedness and Response lessons including:

- Incident Command System (ICS)
- Collections emergency cart
- Safety, PPE (including N-95) & re-entry
- Roles and responsibilities
- Water salvage
- Long-term drying
- Hurricane emergency response
- Fire extinguisher training
- Fire detection and suppression at SI
- Fire salvage

Some participants may be new to some of these subjects. As a facilitator you will be calling on those lessons in order to impart the big picture to your participants. Emergency documentation is just one very important component of the overarching emergency response operation.

This guidebook will walk you through each step of planning and facilitating this virtual tabletop, and if you have any questions, comments, or concerns, reach out to us! The PRICE team and the PRICE Support Team (PST) are here to help, whether that entails helping you plan for the activity, teaching some of the lesson, or simply being your cheerleader throughout the process.

Emergency response is all about context, so for this exercise to be as productive as possible for your participants, it is important that the exercise is close to your organization's (otherwise known as "unit") reality. We encourage you to take creative liberties with the scenario and provide additional information specific to your unit. No one knows your collection or facilities better than you and your colleagues. To that end, you may find it valuable to call upon your Collection staff, Facilities Manager, OSHEM/Safety Officers, or Security staff for input. We have found cross-collaboration produces some exciting ideas! Beyond that, it is vital that we learn to work together in times of peace, so we can better respond together during times of difficulty.

Remember, emergency response is messy and things might not go as you planned. So be flexible, patient, safe, and ready to adapt to the needs of your situation. Lastly, have fun with this!

Sincerely,
Your PRICE Team

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Overview

Estimated Length of Time: 2 hours – 2 hours and 15 minutes + Break Time

Facilitators:

- 1 Primary facilitator, and
- 1 Support facilitator/ 4-5 Participants to assist with the activity

Participants:

- We recommended you invite staff from collections, facilities, security, safety, curatorial, etc. to participate in the exercise for cross-pollination of ideas and because the more people who are trained to respond, the better prepared you will be should an incident occur. Additionally, we suggest a maximum of 25 participants to keep the exercise portion manageable.

This course will cover:

- The basics of documenting a collections emergency.
- How to create tracking numbers.
- How to create a collections emergency tracking sheet.
- How to grid.
- How to implement all the above together should an incident occur that affects collections.

Overarching Objectives:

- To ignite communication and collaboration between staff in different departments.
- To provide an opportunity for participants to get to know each other.
- To learn documentation strategies such as tracking numbers and gridding, and how they support the overarching goal of consistency and communication in an emergency.
- To gain experience implementing collections emergency documentation techniques in a safe and controlled environment.

- To gain an understanding of how collections emergency documentation fits into the larger scope of emergency response.

Suggested Prerequisites for Participants:

- FEMA Incident Command System (ICS) 100 – (publicly available)
  https://training.fema.gov/is/courseoverview.aspx?code=is-100.c
- Roles and Responsibilities Moodle – (SI Internal Only)
  https://si-vmerplms.si.edu/moodle/course/view.php?id=2081

Provided Supplies:

If you are reading this facilitators guide, you should also have access to the below resources. You, your supporting facilitators, and your participants will need them for the virtual tabletop exercise.

- SharePoint Digital Resources:
  - Facilitator Resources
    - This Facilitators guide!
    - Emergency Documentation Presentation (Video)
    - Activity Guide
    - Scenario Room Layout
    - Glossary
  - Participant Resources
    - Activity Guide
    - Glossary
  - Additional Resources (Optional)
    - Gridding & Numbering Resource Guide
    - Sample Emergency Tracking Sheets, Image logs, and other templates

Suggested Supplies for You to Bring:

- Samples or photos of collection tags and accession/catalog numbers from your unit
- If you choose to create your own scenario, be prepared with images of objects and digital floorplans.
  - We recommend customizing the scenario to your unit and using your own storage room floorplans for the activity. The more realistic the training the better prepared your team will be in the long run!

Tabletop Exercise Schedule
Below is a suggested timetable but adjust according to class size. Time estimates below based on 25 participants.

Virtual classroom learning and activity
Total: 2 hours - 2 hours and 15 minutes + Break Time

Time	Content
20-30 min	Welcome and introductions

	• Welcome and brief overview of the training. • Introduce the facilitators. • Participants introduce themselves including any previous collections emergency response experience.
45 min	Emergency Documentation Video (30 min) • Pause at 19:38 for Numbering Activity (approximately 10 min - See worksheet for activity instructions) • Participants share their answers (5 min) • Finish Video
	Break: Up to you! Quick break, lunch break, or finish the second part on day 2
25 min	Numbering and Griding Activity Part 1 • Send Teams into Breakout rooms • Teams complete the Numbering and Griding Activity (See worksheet for activity instructions)
10 min	Numbering and Gridding Activity Part 2 • Facilitators rotate to new Breakout room • Participants communicate their documentation methodology to new facilitator and verbally test the system
20 min	Reflections • Group gathers back together to discuss what they found worked and didn't work (Optional Discussion Questions below)
5 min	What happens next? • Discuss where this type of documentation falls within the full scope of an emergency response

Facilitator's To-Do List:

Preparing for your Virtual Exercise: 1-3 months in advance

1. Identify your participants and support facilitators.
   a) Coordinate with them to find a date and time to host the tabletop and determine whether you will complete the training in one session or two smaller sessions.
   b) Option: Meet with your support facilitators to review logistics and information for the tabletop
   c) Option: Set up a pre-meeting with Participants to review pre-requisite materials
2) Familiarize yourself with all the digital resources
   a) Confirm that all links and files are accessible (you will be sharing these links with the participants soon)
3) Create a virtual meeting room. There are many platforms now (Teams, Zoom, etc.) you can use. You will need one with the breakout room feature. Otherwise, feel free to choose whichever virtual meeting platform you are most comfortable with.
4) Pre-assign participant teams so that different specialties are represented in each group. Share those groups in advance so team members can familiarize themselves with each other.
5) Send the meeting invitation. Make sure to include:

   a) The date, time, and meeting link.
   b) List of pre-assigned groups

c) If you wish to record or take photos of the session, include a request for permission in the meeting invite
d) The link to the 'For Participant' folder on SharePoint, which includes the pre-requisite materials

Preparing for you Virtual Exercise: 1-2 weeks in advance

1) You can use the scenario and salvage priorities we provide or customize the scenario to your unit and determine your unit's salvage priorities.
   - For a unit-specific scenario, prepare a facility map to share with your participants. SI Explorer is a good resource. This will help visualize the scenario and participants will use it for gridding during emergency documentation. See 'Scenario Room Layout' for an example.
   a) If you have any, prepare examples of your unit's unique labels associated with collections items such as high priority, type specimen, etc. for visual representation. You can do so via screenshare with a PowerPoint or by holding them up for the camera. If labels are not available, having images to share for future reference may also be helpful for your participants. Remember, not everyone works with the collection and knows these systems and visual cues!
2) If you haven't already done so, confer with your support facilitators the plans for the day and any additional needs you have. Share with them the 'Facilitator' folder.
3) Review the resource folder for additional information relevant for participants.
4) If you haven't already done so, read through the Facilitator Guide, review the Schedule, and the activity worksheet. If you have any questions or concerns about the virtual Tabletop logistics, reach out to PRICE.
5) Send a reminder to your participants that they should print out the Activity Guide.

Preparing for your Virtual Exercise: The day before and/or the day of

1) Log on early to make sure the virtual room works, the breakout rooms are loaded (if relevant for your virtual meeting platform), the participants have the correct link, and the sound/visuals are working.
   a) Note: it is helpful to do a trial run with your support facilitators to work out logistical kinks and confirm the correct settings are on, such as selecting "share audio through computer" for sharing videos and determine the appropriate screen sharing options.
   b) If you need assistance, go to Zoom Help Center. There you will find lots of helpful instructions as well as videos that demonstrate all the wonderful features.
2) Have videos, PowerPoints, and copies of handouts loaded onto your computer and ready to share via screenshare or as a pdf/hyperlink in the chat.

It's Go Time!
Introductions

3) Please share your name, department, and title
4) Who in the class has experienced a collection emergency? Could you share a brief summary of the incident, the role that you played, and lessons learned?

1) Play the Video
    a) Pause the Video at 19:38.
2) Tracking numbers Activity (10-15 minutes)
    a) This is an independent activity.
    b) Direct participants to page 1 of their Activity Guide and Worksheet document.
        i) You may need to drop the file into the chat.
    c) Give Participants 10 minutes to review the scenario, establish a tracking number system, and apply their system to the collection items.
    d) Ask for a couple volunteers to share what they did.
    e) Finish the video
    f) Take a break!
3) Numbering and Gridding Activity: Part 1 (25 minutes)
    a) Direct participants to page 2 of their Activity Guide and Worksheet document.
    b) Send teams and their facilitators to their breakout rooms.
    c) Facilitators will set up the collabshot with the floor plan, or whatever program you choose, and put the link in the chat so the team can all work in collabshot together.
    d) Facilitator help guide the group through the activity steps and prompt discussion as needed
    e) Give support facilitators 2 minute warning that they will be swapping rooms soon.
4) Numbering and Gridding Activity: Part 2 (10 min)
    a) Facilitators swap "rooms". The main facilitator can move the PSTers to different rooms in the Breakout Room function.
    b) Participants explain to new facilitator the system they devised
        i) If team can effectively communicate the priorities and grid system, the facilitator can virtually locate the right item. If not, teams will need to improve communication or revise the plan using support facilitators feedback
    c) Return to the main virtual meeting room

Discussion & Debrief

5) Reflections (20 min)
    a) Each group/team explains gridding and tracking system to the class
    b) See discussion questions and prompts below
        • How well did your overall documentation methodology function? What worked well and what could be improved upon?
        • Was your gridding system easy to communicate and understand? Is it logical and easy to follow? Can someone under stressful conditions take your system and run with it consistently?
        • How have your ideas about documentation in a collection emergency evolved since participating in this tabletop?
        • How would you communicate your documentation strategy effectively to the next shift?
        • Is there any information or tools you wish you had while you were planning and how will you address these topics in your home institution?

- This is a virtual activity. How might real onsite processes differ than this virtual activity?
6) What Happens next? (5 min)
    a) Main facilitator guides the discussion back to how emergency documentation fits into the bigger picture of collections emergency response and what happens after the salvage operation.
        i) How does documentation fit into the bigger picture?
        ii) In any collection emergency, what happens next?

After the training session:
1) Share your lessons learned, thoughts, and reflections from the training with NCP-PRICE! We are always looking for ways to improve. Feel free to include photos or descriptions of some of the clever, creative strategies participants come up with
2) Download the attendee list and share it with PRICE (NCP-PRICE@si.edu). If you used Zoom, you can find the attendees list in your Zoom Account under Reports -> Usage -> Select the date(s) they hosted meetings -> Scroll the page to the right -> Click the blue highlighted number under Participants.
3) Looking for ways to keep your team motivated and working together? Here are a few suggestions for optional follow-up activities:
    a) Participants complete postcard activity (See Facilitator Resource Folder)
    b) Complete the scenario again in different teams with attendees playing different roles
    c) Conduct the in-person version of this exercise. While the virtual exercise covers the same topics and holds the same learning objectives, there is no replacement for the in-person, hands-on learning experience
    d) Explore the PRICE SharePoint Site for additional tabletops, webinars, watch party and training ideas