

**I Am a Director of a Simulation Center...  
Now What?  
The Policy and Procedures Handbook for  
Sim Center Directors**

**Directors of Sim Centers SIG**

# The Policy and Procedures Handbook for Simulation Center Directors

2021

This Policy and Procedures Workshop has been developed over the course of several Director's SIG sponsored workshops entitled "I am a Director of a Sim Center...Now What? The Policy and Procedures Manual for Simulation Center Directors" held every year since IMSH 2011. While the faculty has rotated depending upon availability, this workshop has undergone revisions with a number of experienced Directors.

We have included the Simulation Policy and Procedures Manual from the SSH website. This can also be accessed on the SSH website for downloading. While this represents a comprehensive list of policies and procedures a sim center should have, each center may not need to address every item in this manual. The SSH P & P Manual is a listing and discusses what each item should or could include.

Directors may also need to identify program specific areas to include in their own P & P manual. Areas such as personnel hiring and firing, as well as budget development and use are essential to running Sim Centers, but are not necessarily part of a working P & P Manual.

In completing these worksheets, Directors will be able to develop their own institution's P & P Manual. Many of the sections include "issues to consider" these represent the information gathered from the participants in the workshop who had come up with additional points to remember from their own working manuals.

Please remember that P & P manuals are generally considered 'works in progress' and are rarely complete. The USF Health Simulation Consortium's P & P Manual is kept in each of the centers in a three-ring notebook, as well as in a virtual cloud. This allows us the opportunity to update and change out procedures, based upon need.

Please let us know how you use this manual, whether it was useful for your center; feedback from you will help us improve as well.

Good luck and welcome to the Director's world of Simulation.

Dawn M Schocken  
Director, Center for Experiential Learning and Simulation  
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*In this area, you want to highlight program specific areas that must be incorporated into your simulation program. If you are focused on Graduate Medical Education, you want to include ACGME areas specific to simulation and accreditation. If you are a professional education program, who will you partner with, advertise to, market to, etc...*

- ▶ *Experience from the Field*
- ▶ *Job Parameters?*
- ▶ *Sense of Direction / Organization?*
- ▶ *Accreditation?*
- ▶ *Think Time?*
- ▶ *Mission / Vision of the Program?*

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

### Initial Steps: Issues to consider...

*Be as specific in your outline as you can. Work with your “team”, whoever this is deemed to include developing these areas, vetting them with the champions who will fund and sponsor your program.*

#### **Business Plan**

1. *Mission and vision and then ask for Space /Location*
2. *Budget*
  - Salaries*
  - Warranties*
  - Supplies*
  - Resources*
3. *Staffing*
  - early to get commitments*
  - Later when space resources in place*
4. *Oversight/reporting structure*
  - advisory council vs. decision-making body*
5. *Measurables*
  - Quality*
  - Research*
6. *Sustainability*

*Mission-present –will be going back to it*

- *Vision – longer range (learners)*
- Process is invaluable*
- Org leadership / Management (org charts)*
- Executive Summary*
- Financial Plan*
- Operation Plan*
- Utilization (what’s 100%)*
- Link Budget*
- Threats – challenges / barriers*

**Initial Steps:**

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**Mission Statement:**

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**Personnel Needs:**

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**Space Needs:**

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**Budgetary Concerns:**

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### Equipment: Issues to consider...

*Use vendor information, wish lists, student requirements, and accreditation requirements to complete this area.*

*Consumables (trends)*

*replacement \$*

*rental?*

*Recycling*

*Simulators*

*Non-Consumables*

*Task Trainer*

*Audio/video/computers*

*Safety Protocols*

*Storage (Active /Passive)*

#### **Usage**

*Planned use*

*Training*

*Competencies for staff/technician*

*Cleared to use*

*Oversight*

*Point person*

*Policy for misuse*

#### **Best Solutions**

*Checklists*

*Policy for all*

*Case planning (equipment, supplies, staff)*

*Carts (case specific)*

*Logical Storage*

*Mirror clinic setting*

*Label –“Not Human Use”*

*Ordering guidelines*

*Ownership*

*Loan agreements*

*Location*

*Tracking*

*use*

*hours*

*service*

*Plan*

*Warranty*

*replacement cycle*

*Desires*

*Needs Assessment (Policy)*

*Stakeholders*

*Based on Profile (mission)*

### **Care**

*Usage log*

*Storage*

*Cleaning*

*Delegation*

*Ground Rules*

*Daily*

*Long Term*

*Maintenance*

*Pre/Post scenario*

*checklist*

*Lending / return / tracking*

*Security*

*Scheduling*

*Who (Owners?)*

*Priority*

*Down Time (Sim Recovery)*

*Special Circumstances*

*Checked out equipment*

*Open lab hours (supervision?)*

*Train the trainers*

*video?*

*Modules*

*Student / User Orientation*

**Equipment:**

**What do I have now?**

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**Where do I store it?**

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**How do I maintain this equipment?:**

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**Who is in charge of running the equipment?**

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**When is it available?:**

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**How do I keep track of the equipment?**

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### Safety: Issues to consider:

*Learners vs. staff safety (Psychological and emotional)*

*Videotaping – How long to keep your films? What can you post? Where?*

*What about faculty from another course?*

*Legal ramifications – can video be subpoenaed?*

*How long after graduation do you keep?*

*Faculty development in debriefing, Develop philosophy for faculty and student behaviors*

#### **CONFIDENTIALITY**

*Include in orientation*

*Uniform code for students and faculty*

*Treatment of equipment*

*Physical; Gases; Electrical*

*Storage/ Locked / Signage*

*Who and When?*

*Visitor Safety > what they see and don't see*

*How to determine what is appropriate*

*Physical Security*

*Center locked / Hard Key*

*Security of equipment*

*Sharps*

*Latex*

*Emotional Distress*

*SPs (referrals)*

*Triage for dealing with disruptive students*

*How to handle high achievers who don't do well*

*Disaster / Emergency Planning*

*SPs: Physical exam*

*Disclose any physical disabilities*

*HR and occupational medicine*

*What happens when you disclose abnormalities*

**CONFIDENTIALITY**

### Safety:

#### General Safety in the Simulation Center:

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#### Safety Policy for Faculty and Instructors:

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#### Safety Policy for the Simulation Center Staff:

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#### Safety Policy for Learners:

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#### Safety Policy for Patients (if necessary):

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### Governing Bodies: Issues to consider:

*Composition, what is the composition, who is the Key Stakeholders, who is your Finance Officer, who is the Safety Inspector, who is your Shareholders?*

*What is the Role of Governance? Guide vs. Decide, Power in Numbers, Transparency, Funding?*

**Champions:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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**Decision Makers:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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**How are decisions made?** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
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**Do you need a Board of Directors/Governors?** \_\_\_\_\_  
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**Who is on the Board?** \_\_\_\_\_  
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**Board Responsibilities?** \_\_\_\_\_  
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**Credentialing:**

**Faculty / Instructors – Who is the expert?**

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**What is expertise, how is it defined specifically? Who makes the decision of this expertise?:**

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**Oversight, who vets your experts? Who vets the individuals who vet your experts?:**

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**How often is one reviewed, renewed, updated?**

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**Documentation and Evaluation, what do you include, e.g., degrees, certifications, program completion, experience?:**

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### Curriculum: Issues to consider...

*How do you develop your curriculum, who conducts the gap analysis, how are programs organized, how do you decide to accept and/or reject a program? Is there a curriculum committee reviewing the learning objectives and assuring the objectives and evaluations mirror what your center/organization supports? Describe your process in detail.*

#### Program Organization:

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#### Needs Assessments:

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#### Prioritization of Needs:

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#### Teaching Plans:

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#### Review of Teaching Plans:

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### Instructional Methodology:

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### Curricular Review:

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### Curricular Evaluation:

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### Program Evaluation:

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### Evaluation: Issues to consider...

*How do you develop your evaluations, does it align with the curriculum, with the goals and mission of the center, what are the steps in developing an evaluation, vetting an evaluation, reviewing a completed evaluation, how do you decide to accept and/or reject an evaluation? Is there a curriculum committee reviewing the learning objectives and assuring the objectives and evaluations mirror what your center/organization supports? Describe your process in detail.*

#### Curriculum Assessment:

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**Who is the assessor, how are they chosen, is this the same person who developed the program?**

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**How are they credentialed, who makes this determination, what is their background (degree vs. experience)?**

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**Who is their oversight (aligning with a larger organization to assure that your work has oversight)?**

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**Evaluation of Learners, is this done routinely, what is done with these evaluation, is it ever discussed?:**

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# The Policy and Procedures Handbook for Simulation Center Directors

2021

**Evaluation of Program, how often do you review the evaluations, how do you plan to report on this information?:**

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**Evaluation of Equipment, needs to be done by staff, learner, faculty and center director to assure that the right equipment is being used for the appropriate task:**

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**Evaluation of Staff Performance both the process completed on an annual basis as well as the evaluation of the effectiveness of the staff in any given program:**

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**Evaluation of Program Effectiveness - did the program meet their goals, how do you know, who reviews this information, when is feedback given to faculty?:**

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**Frequency of Evaluation:**

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### Standard Operating Procedures - SOPs: Issues to consider...

*SOPs are developed as a staff and faculty training tool. It needs to be extremely granular, what to do first, what to do second, etc. How to use the equipment, the data management, etc.?*

**Who writes the SOPs:**

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**What is included?**

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**How do you disseminate the information?**

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**Where are they kept?**

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**When do you use them?**

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### Marketing your Center: Issues to consider...

*Marketing is often key to survival. Who knows you exist, who uses the Center, can others help pay for equipment, staff, faculty time, etc.? Do you have an effective plan to assure that you will be in operation in ten years? This is part of your policy and procedures manual as you must think, what if I am not here?*

#### Funding Source(s):

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#### Decision Makers:

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#### Center Goals:

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#### Where is the Center?

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#### Who are the learners?

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#### What is the sustainable model?

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### Institutional Specific Policies: Issues to consider...

*These will vary my institutions, but you must know your institution's policies and procedures and be aligned with theirs. A united front usually can provide program continuity.*

#### Faculty Credentialing and Development:

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#### Confidentiality Guidelines:

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#### Disclaimers Needed?

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#### Research and Development?

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#### Vendor Relationships?

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#### Conflict Resolution:

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### Additional Information Needed:

*What do I still need to know, what am I missing, what have I left off?*

### Questions Discussed at the end:

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### Presenter Information:

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### Mentorship Needed:

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