**Planning a Blood Shortage Exercise - Checklist**

* Introduce concept at hospital transfusion committee meeting (or other similar committee) for approval
* Initiate a working group to develop the exercise
* Ensure you have a Hospital Emergency Blood Management Plan (HEBMP) in place
* Create a scenario for the blood shortage exercise (i.e. red cells/platelets; Amber vs Red Phase)
* Determine scope of exercise (hospital wide, laboratory only)
* Draft mock notification from Canadian Blood Services (CBS) to initiate exercise
* Determine how the exercise response will be monitored/documented
* Determine criteria for success (time notifications completed, response of committee attendance, compliance with documentation procedures)
* Ensure your HEBMP has the necessary contact lists and documentation logs in place
* Indicate clearly on any documentation “Simulation Exercise Only” to ensure there is no adverse effect on patient care
* Incorporate patient case scenarios to test triage capabilities if desired
* Plan for Recovery Phase communication – allow the exercise to stand down
* Analyze the results (compare how well the procedure was followed, how complete the notification was, and how quickly the necessary personnel were notified)
* Hold a debriefing session on the exercise to review results and solicit feedback from those involved
* Make any revisions to your HEBMP to improve it based on lessons learned in the exercise
* Train everyone on revisions to ensure necessary personnel are aware of the most current version of the plan