**Toolkit for self-directed learning**

RCOT 2022 Casson Memorial Lecture

*Optimising performance, clinical and economic outcomes in occupational therapy service delivery*

**Introduction**

A person wearing glasses and a suit

Description automatically generated with medium confidenceThis reflective toolkit will assist you to widen and apply your learning from the RCOT 2022 Elizabeth Casson Memorial Lecture delivered by Dr Sidney Chu. Dr Chu is a long-standing and well-respected member of the occupational therapy profession with a strong national and international profile in the field of paediatrics. He has used the lecture as an opportunity to share with us his experiences of service improvement to promote the practice and value of occupational therapy.

Dr Chu’s lecture is a call for occupational therapists to rise to a new level of sophistication in demonstrating that the services we provide are efficient, effective, and cost-effective to optimise performance, clinical and economic outcomes in our service delivery. As he highlights, where once only performance outcome data related to service efficiency were required, now evidence of clinical outcome (related to service effectiveness) and economic outcome (related to service cost-effectiveness) is demanded. To meet this demand, occupational therapists must continue to innovate the structure and processes of service delivery to achieve better performance and clinical outcomes and to be valued for our economic usefulness.

Dr Chu highlighted that to achieve this, we need strong leadership, the use of various service improvement strategies and collaborative research between managers, clinicians, researchers, health economists, and with patient and public involvement. Importantly several service improvement strategies, based on practice-based and research-based evidence, were presented which we should embrace to optimise performance, clinical and economic outcomes.

This toolkit poses a series of questions to prompt you to think carefully about the specific content of the lecture and what it means for you and your area of practice. This will help to deepen your learning from the lecture and help you to really consider how the content can be applied to your service. Working through the questions and analysing your own service delivery will help you to identify areas of good practice, areas for development and actions.

The toolkit supports the Leadership Pillar of the [RCOT Career Development Framework](https://www.rcot.co.uk/cpd-rcot). It is suitable for people at all career levels. You can use it as an individual or in pairs or groups of friends or colleagues to promote further discussion and critical thinking. If you are using it on your own, spend more time on the individual initial reflection after watching the lecture. You can share your learning or the questions the lecture raises for you in supervision or with colleagues.

If you chose to use the toolkit with others, there is an accompanying facilitator guide which can help you to plan, structure and make the most of your discussions.

RCOT is grateful to Dr Chu for his collaboration to develop this resource.

**Viewing of RCOT 2022 Elizabeth Casson Memorial Lecture**

(Takes about 1 hour 15 minutes. Lecture starts at 6.30pm)

<https://www.rcot.co.uk/2022-elizabeth-casson-memorial-lecture>

**Individual initial reflection**

(Suggested time: 20 minutes)

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| During or immediately after the lecture, jot down your initial thoughts in response to the following points. |
| 1. Which aspects of the lecture presented by Dr Chu particularly inspired you? Why is that? |
| Click or tap here to enter text. |
| 1. Dr Chu discussed the interdependent relationship between performance, clinical and economic outcomes as an important practice factor for service improvement. How do you relate this concept to the service where you work either as a staff or as a manager? |
| Click or tap here to enter text. |
| 1. To optimise performance outcomes (service efficiency), Dr Chu stressed the importance of having good workforce planning and staff development programme to build up a workforce that is contented, devoted, and fit-for-purpose; applying Lean Thinking service improvement strategies to streamline the processes of service delivery; working collaboratively with other agencies and services; involving stakeholders and service users to shape the service; developing good structure and innovative model of service delivery.   Can you relate these suggestions to the structure and operational processes of the service where you work either as a staff or as a manager? |
| Click or tap here to enter text. |
| 1. To optimise clinical outcomes (service effectiveness), Dr Chu emphasised service delivery should be based on different components of evidence-based practice, underpinned by the philosophy of person-centred / family-centred care practice, setting participation-based goals through the collaborative goal setting process, and applying both quantitative and qualitative outcome measures to determine treatment effectiveness and level of client satisfaction.   Are you adopting this good practice in your clinical work? |
| Click or tap here to enter text. |
| 1. Reducing cost of running a service is one of the aspects to optimise economic outcomes (cost-effectiveness) of a service. Dr Chu illustrated the importance of streamlining the service to produce more clinical input hours for direct client contacts by using various service improvement strategies e.g., Lean Thinking.   Do you think you are working in a very “Lean” way in service delivery? |
| Click or tap here to enter text. |

**Paired discussion**

(Suggested time: 20 minutes)

Find a partner to work with. Share your answers as far as you feel comfortable and discuss your thoughts.

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| 1. Dr Chu advocated that managers should involve all clinical, support, and administrative staff in various service improvement activities to optimise the performance outcomes of the service as a basis to achieve better clinical outcomes and economic outcomes.   Do you think you have the opportunities to be involved in service improvement? |
| Click or tap here to enter text. |
| 1. When thinking about all the service improvement strategies described by Dr Chu, can you identify any gaps in your service that you can explore further? |
| Click or tap here to enter text. |
| 1. Can you identify any learning / action points for yourself and also for the whole service to pursue service improvement? How do you prioritise these learning / action points? |
| Click or tap here to enter text. |

**Group discussion**

(Suggested time: 20 minutes depending on group size)

Using your initial reflections and paired discussion, consider the following questions.

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| 1. To improve the efficiency of the service, Dr Chu stated that occupational therapists should focus on avoiding the wastage and maximising the use of resources, time, and effort in services delivery.   Can you as a group identify any wastages of resources, time and effort in your service? What can you do to reduce these wastages? |
| Click or tap here to enter text. |
| 1. What actions can the whole staff group take to apply the information to optimise performance, clinical and economic outcomes in the service? |
| Click or tap here to enter text. |
| 1. Which areas are you going to prioritise for the whole service? What are the rationales behind your decision? |
| Click or tap here to enter text. |
| 1. What resources and support do you need to put the prioritised ideas into action? |
| Click or tap here to enter text. |

**Final individual reflection**

(Takes about five minutes)

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| 1. Do you have clear ideas on what you need to do as an individual and as a group? |
| Click or tap here to enter text. |
| 1. Are there any barriers holding you back in making changes? How do you remove these barriers? |
| Click or tap here to enter text. |
| 1. How do you influence or motivate others to pursue service improvement when you encounter therapists who are reluctant to change? |
| Click or tap here to enter text. |

**Close**

You may wish to arrange to meet up as a group or in pairs at a future time to discuss this topic further.

**Follow-up: reflection and application**

Revisit this resource in the next few days. Review your answers to the questions. You might want to discuss your reflections with someone else. Save this page in your CPD portfolio.

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| Reflect on and record your answers to the following topics. |
| 1. The impact of my learning from this lecture on my practice has included: |
| Click or tap here to enter text. |
| 1. I would now like to learn about: |
| Click or tap here to enter text. |
| 1. The changes I will make to my practice to benefit my service users are: |
| Click or tap here to enter text. |

**Feedback**

Your views are important to us! Please send us your feedback about this resource so that we can make improvements for future participants.

Email your suggestions or any issues to [Prof.Dev@rcot.co.uk](mailto:RCOTApprovedLearning@rcot.co.uk).

**Previous RCOT Elizabeth Casson Memorial Lectures**

If you have enjoyed this event, you may want to view previous lectures.

2021 – [*No barriers to brilliance*](https://www.rcot.co.uk/deep-dive-learning#no-barriers-to-brilliance-casson-lecture-2020)*,* Dr Anita Atwal

2020 – [*Re-engineering truth and certainty in occupational therapy*](https://www.rcot.co.uk/deep-dive-learning#re-engineering-truth-and-certainty-in-occupational-therapy-casson-lecture-2020), Dr Jenny Preston

2019 – [*Shifting our focus. Fostering the potential of occupation and occupational therapy in a complex world*](https://www.youtube.com/watch?v=HYgWV-U91NM&t=1s), Dr Sarah Kantartzis

2018 – [*Occupational stories from a global city*](https://www.youtube.com/watch?v=brLv9p7lCpI), Dr Nick Pollard