

Severnside IUC Clinical Forum SOP

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Clinical Forum SOP

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Background

SevernSide has hosted monthly Clinical Forums for several years. Historically these were face to face sessions but have been remote/ online since the Covid pandemic. This has made the sessions more accessible to a wider group of clinical colleagues, including remote workers.

Clinical Forums are an opportunity to share learning with SevernSide clinicians, from real life, anonymised clinical cases that have been managed in the Out of Hours (OOH), Weekday Professional Line (WDPL), System CAS (SCAS) or F-ACE services. Cases may have been part of a learning event or complaint. It is an opportunity to share updates around new guidance and changes in processes. Facilitators are encouraged to celebrate success.

Objectives of the procedure

The clinical leadership team has grown significantly over the last two years, so a wider group of colleagues now contribute to hosting/ facilitating the Forum sessions. This SOP aims to streamline the clinical forum process so that it is reproducible by all colleagues.

The Standard Operating Procedure

Forum organisation

The Forum sessions are planned for the year ahead in October. Responsibility for this is held by the Governance team. Forums occur once a month and last for 1.5 hours, and the 12-month programme will ideally include a mixture of daytime and evening sessions across different days of the week to widen access.

The rolling programme will include the following sessions, with flexibility around the remaining topics and areas of focus depending on service need and colleague requests.

- Safeguarding adults and children
- End of Life care
- Paediatrics
- Frailty
- Blood test results

Other themes will run through many of the topics, these include:

- Learning from learning events and complaints
- Antibiotics, Medicine management and prescribing
- NICE updates,
- Sepsis
- Service updates
- Effective consulting

All SevernSide Clinical Leads, the Clinical Guardian team and the Senior Clinical Leadership team are invited to host 1-2 sessions during the year. Clinicians may choose to buddy up to co-facilitate Forums together, or do so individually. There may be occasions where external expertise is invited to support discussion.

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Communication/ promoting Forums

Clinical Forum dates for the year are shared at the bottom of the fortnightly SevernSide Clinical Newsletter.

The Governance Team is responsible for sending an email reminder to all clinicians the day before the Forum, using the Clinical Newsletter distribution list (and excluding GP trainees). Below is an email template that can be used. The Governance Team will ask the hosting Lead clinician(s) to amend this before sending. Leads may wish to asking clinicians to contact them with case details they would like to discuss during the session.

Dear Colleagues,

*We welcome you to join us for tomorrow's Clinical Forum on Teams at **start-finish time**. The forum theme is _____. The sessions are interactive and case based. We will bring some interesting cases and invite you to contribute to the discussion and ask questions.*

*Please feel free to bring your **lunch / dinner** along to the meeting.*

The meeting will take place on Teams. The joining details are below.

[Click here to join the meeting](#)

Meeting ID: 342 154 442 67

Passcode: g9DscC

Best Wishes

Session Plan and Document storage

All documents relating to Clinical Forums are saved here.

S:\GOVERNANCE TEAM\CONFIDENTIAL - DAC\28. Clinical Forums

Facilitators will complete the session plan (See Appendix 1). Yearly and Monthly folders are set up in the forum folder to save this. Please specify learning event and BOB reference codes if discussing cases which have been flagged as learning events or complaints. You may wish to list key discussion points as reminders/ prompts for discussion/ facilitation. Add any links you wish to share with participants in the session plan, to enable easy copy and paste into the meeting Chat.

The main learning is from facilitated group discussion focused on clinical case discussion, shared learning and debate. Occasionally short power points may be used to share learning points but this is usually minimal and is not required. Choose cases that have some useful and relevant learning that can be teased out of the discussion.

Forum Facilitation

The facilitator(s) will open the session introducing themselves and the topic, moving on to cover the listed details/ reminders included in the introduction section of the session template.

Because discussion and interaction is key, move on to enable each participant to introduce themselves (usually name and role/ service). If there is a very large number of participants this

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could be done in the chat to save time. If introductions are going on too long, you can stop, apologise and ask people who haven't had the opportunity to say hello in the chat. Teams will log all the people that have attended the session.

Briefly outline the overall structure/ plan for the session.

- Mixture of cases. Consider asking participants to flag in the chat if they have a case they would like to discuss during the session so you can factor that into timings.
- Broad range/ meaty topics, aim to finish by a particular time, including time for you to complete the online evaluation form
- And importantly to share/ celebrate positive experiences/ learning/ feedback

Cases are key to enabling discussion and participant contribution. We suggest/ recommend not sharing the whole case story, examination, plan and real-life outcome at the start. Instead, chunk up the information you share then open for discussion/ questions before sharing more information to 'unfold' the story. Prompts such as 'What else would you like to know?', 'What differentials are you considering?' or 'What might your management options be at this point?' can be helpful ways to encourage contributions. You can respond to the group seeking more information based on your knowledge of the case as part of the discussion, and/ or feed in more information to move the discussion along. Do prompt/ encourage different views/ approaches with questions like 'Would anyone do something different to that?', or 'I wonder if that approach might feel risky/ uncomfortable to some?'

Top tips

- Acknowledge there are often many different approaches that can be taken when managing a case.
- Acknowledge when technology not working how you would like
- Consider bringing a case you were involved in as part of the session. Generally, we'd suggest sharing your own involvement later in the discussion rather than at the outset to enable others to feel able to contribute. But 'owning' cases are difficult, we are all learning and there are improvement/ learning opportunities in most cases will often encourage others to feel safe to contribute.
- When asking what others think, try to hold the pause and wait for contributions, if no one speaks, you might consider labelling the silence.

Useful phrases

- "I wonder if..."
- "I wonder how people feel about..."
- "So you would do.... Because...."
- "What do others think?"
- "Had you thought of any other options?"
- "There has been some recent guidance which helps us... I'm adding the link in the chat"
- "Tell me more"

How to handle very vocal / controversial person

This can be tricky. Try not to respond negatively to a contribution even if it may not be your approach. Instead, acknowledge the contribution and you may say something like 'there are often many different ways to manage these tricky situations, would others follow that same approach?', 'What other options might there be?', or 'How do others feel about that?'

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- “Thank you for your thoughts...”
- “I hear...” then summarise what they have said
- “I am conscious of time and can see others are keen to contribute, so I am sorry to interrupt you...”
- “Could I give you a minute as we do need to hear other’s views”
- “Perhaps that’s something we could follow up on afterwards,”
- “I can hear you are worried about XX. Let me take away an action to follow that up outside this meeting”. Or potentially suggesting that they log a learning event and/or discuss with their line manager (for employed colleagues).
- “Might other people have different approaches”
- “Thanks for your suggestions. It’s one of the reasons I really enjoy these sessions as they always make me think differently, but I would want to flag that in this situation we would need to follow the SevernSide policy on XX”

Facilitation resources

- [NHS England facilitation toolkit](#)
- Damian Kenny is a local GP with years of facilitation and GP education experience. As well as consultation skills resources, his website has useful content about [small group facilitation skills](#).

Session Feedback

Feedback is invaluable in helping to define content for future sessions, but also providing facilitators with feedback about this session. Always ask colleagues to complete the short online survey using the link below (pasted in the Chat).

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The Clinical Governance team is responsible for downloading and saving the session feedback results in the relevant Forum folder, and sharing it with the facilitators within a week of the session.

A Lead clinician will collate and review feedback annually. Forum feedback will be added to the clinical Leads meeting agenda. The team will look for trends in the feedback and consider changes to the Forums / and suggestions for future topics in the autumn each year.

Sharing learning in the Clinical Newsletter

The Lead Clinician Facilitator(s) for each Forum is/are responsible for distilling 2-4 headline learning points/ reminders for the subsequent SevernSide Clinical Newsletter. If co-facilitating, or other leads are participating in the Forum, it may be helpful for them to log/ document this during the session for Facilitator(s) to review/ sign off afterwards.

The Clinical Governance Team will send a reminder to the Clinical Leads about the deadline for the next clinical newsletter each fortnight. The Clinical Governance Team will chase the Facilitator(s) if forum content has not been received by the newsletter deadline. The Clinical Lead reviewing the final newsletter content before it is sent will chase again if the Forum learning is not included.

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Role of the Clinical Governance Team regarding forums

- To add forum planning to the Clinical Leads meeting agenda in October
- Clinical Forum dates for the year are shared at the bottom of the fortnightly SevernSide Clinical Newsletter.
- Make the Teams links for the sessions.
- Send an email reminder to all clinicians the day before the Forum, using the Clinical Newsletter distribution list (and excluding GP trainees).
- Ask the facilitators to complete the session plan and make sure it gets saved in the correct folder.
- To download and save the session feedback results in the relevant Forum folder, and sharing it with the facilitators within a week of the session.
- Send a reminder to the Clinical Leads about the deadline for the next clinical newsletter each fortnight and chase the Facilitator(s) for a summary of the forum learning if it has not been received by the newsletter deadline.

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Appendix 1

SevernSide IUC Clinical Forum Session Plan

Date

Session theme

Facilitators

Introductions

- Acknowledgement of Teams
- Chat and type “Q” if have a question (especially if large group)
- Not recording the call so welcome to take own notes, creating a safe space to allow everyone to contribute
- Key learning points from the session will be shared in the newsletter
- Acknowledge that people in the room may have been involved in the cases we discuss and to be considerate of this.
- Recognise that there is diversity in how we all approach cases
- Encourage / ask everyone to keep camera on
- Ask if anyone has any particular cases to bring to the discussion
- Session plan –
 - Mixture of cases
 - Broad range/ meaty topics, aim to finish by **time**, including time for you to complete the online evaluation form
 - And importantly to share/ celebrate positive experiences/ learning/ feedback
- Ask all colleagues to introduce themselves

Evaluation link

To paste into the chat box towards the end of the session. Encourage people to complete this.

<https://www.smartsurvey.co.uk/s/0Q6C7I/>

Cases, topics, learning points and updates for discussion

Please include Cleo / LE/ BOB numbers for cases in which an action was to share learning at a Forum

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1. Case

2. Case

Learning points for discussion

Summary for Clinical Newsletter