Queensland Government

Occupational Therapy Clinical Education Program (OTCEP)

Guide to Customisation of the SPEF-R

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The Student Practice Evaluation Form – Revised edition (SPEF-R) is used to assess occupational therapy (OT) students on practice placements. It can be customised to facilitate evaluation of student performance within specific clinical settings. This guide has been developed within the Occupational Therapy Clinical Education Program (OTCEP) to support clinical educators who would like to customise a SPEF-R for a practice placement and can be used alongside guidance provided within a comprehensive training package, detailed below. Information to guide the customisation process can be found below. The rest of this guide provides examples of customisation statements under each of the SPEF-R domains and item banks to give ideas of how to formulate statements and can be used or modified as needed.

What is the SPEF-R?

The SPEF-R is a criterion referenced assessment which is used as the primary practice placement student evaluation for Queensland universities.

> 'The SPEF-R is designed to be graded pass/fail with the emphasis on providing students with feedback that is helpful, objective and specific'

More information can be found about the SPEF-R in a comprehensive training package: http://www.uq.edu.au/spef/index.html

Why should a SPEF-R be customised?

The SPEF-R user manual encourages clinical educators to develop workplace specific examples for the various item banks used to evaluate student performance. These are suggested as an adjunct to the standard examples of relevant behaviours provided on the evaluation form that clarify and facilitate evaluation of student performance. This process has been described on page 2 of the manual as "customisation".

The purpose of customisation is to provide workplace specific examples of behaviours that might be useful in evaluating student performance. It also serves to inform the student of ways in which s/he might demonstrate attainment of skills, as well as helping to direct learning experiences throughout the placement.

How should a SPEF-R be customised?

The following document provides examples of statements which could be added to a SPEF-R to customise it to a specific work area. The examples given may be relevant to some work areas but not to others. Where they are not relevant or able to be modified for a specific work area, their style and structure may assist clinical educators in developing their own examples. It is important to consider the number of examples given under each objective as too many examples could be overwhelming to the student. Not all item banks need to be customised. It is also important that students understand that the examples given do not form an exhaustive list of all the actions which a student needs to demonstrate in order to pass that domain or objective. Customisations can be written onto a paper based SPEF-R tool for a specific work area or alternatively typed onto the online SPEF-R. Accepted terms will vary depending on the practice settings. The terms client and service user have been used within this document for consistency with the SPEF-R domains and item banks. These can be modified to be consistent with the clinical setting as necessary. Clinical Education Support Officers (CESOs) can be contacted to provide guidance with the customisation process.

When should a SPEF-R be customised?

Customisation should occur prior to the placement so it can be discussed with the student during placement orientation. This ensures the clinical educators expectations are made clear.

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6 questions for Clinical Educators (CEs) to consider when customising the SPEF-R are:

1. Does the customised example contextualise the item to the specific local Queensland Health setting?
2. Does the customisation maintain the validity of the tool? Adding a customised statement which isn't consistent with the domain or item bank could add unnecessary complexity and affect the validity of the tool, thus disadvantaging the student.
3. Will the customised example assist the clinical educator to evaluate the student on this item?
4. Will the customised example clarify for the student the expectations in order to meet the requirements for this item?
5. Is the customised example written with an 'action verb' clearly stated at the beginning?
6. Is it possible to include practical examples, web links, policies, document names etc. to further illustrate the item?

Further Information

In addition to the SPEF-R Manual the University of Queensland provides an online SPEF-R learning module which discusses the customisation process
www.uq.edu.au/spef/the-how-to-of-customising-item-examples#vignettes

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1. Professional Behaviour: Conducts self in a professional manner

1. **Respects rights, values, beliefs and needs of service users and staff** *e.g. uses non-discriminatory and not-judgemental language; validates others' values and perspectives; separates own values from those of others; adheres to relevant legislation…*
- Respects clients /carers' right to make informed decisions, even when these are contrary to recommendations
- Respects clients wishes during home visits e.g. taking shoes off at the front door, where to sit, etc.
NOTE: Clinical Educator (CE)could specify relevant legislation for work unit and identify examples of ways in which student could demonstrate compliance.

2. **Adheres to privacy and confidentiality requirements** *e.g. handles workplace documentation appropriately; adheres to privacy policies, legislation and codes of conduct…*
- Ensures necessary processes followed when sending confidential information e.g. using a fax cover sheet when faxing information, using secure systems when sending information electronically.
- Ensures service users charts are used and stored in an appropriate location.
- Follows accepted local procedures relating to taking service user's documentation on home visits.
NOTE: CE could specify relevant legislation for work unit and identify examples of ways in which student could demonstrate compliance.

3. **Ensures personal, co-worker and service user safety** *e.g. complies with occupational health and safety policies, procedure and legislation; demonstrates awareness of potential hazards; identifies need for risk analysis; reports incidents as required…*
- Complies with relevant work unit procedures to promote personal and co-worker safety e.g. home visit risk management work instruction, staff sign in/sign out systems.
- Complies with relevant work unit procedures to promote client's safety e.g. completes falls risk screening tool.
NOTE: CE could specify relevant legislation for work unit and identify examples of ways in which student could demonstrate compliance.

4. **Adheres to workplace procedures and expectations** *e.g. adapts to workplace culture; maintains appropriate appearance and attire; follows administrative procedures; manages shared spaces and resources appropriately…*
- Effectively books and negotiates use of space and resources as required e.g. desks, computers, treatment rooms, fleet cars.
- Complies with uniform policy appropriate to work unit.

5. **Represents Occupational Therapy (OT) in an appropriate manner** *e.g. explains OT clearly to others; assumes OT role appropriate to setting; adheres to OT Australia Code of Ethics…*
- Describes OT role to service user appropriate to context of the service unit.

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2. Self-Management Skills

1. **Demonstrates effective time management skills** *e.g. are punctual; completes work within appropriate timeframes; plans work schedule…*
- Manages allocated workload effectively within available work hours and according to relevant priorities e.g. develops a weekly timetable/plan with designated time allocated to contact, planning/preparation, documentation, referrals, project work, meetings.
- Uses relevant workplace tool to aid prioritisation e.g. ward priority checklist, acute ward priority tip sheet.
- Communicates workload concerns with CE, and initiates and negotiates possible solutions and timeframes where appropriate.

2. **Assumes responsibility for own learning** *e.g. articulates reflection-on-practice; evaluates and plans for improvement of own practice; seeks help/information/resources appropriately…*
- Actively seeks appropriate learning activities e.g. requests to work-shadow allied health team members, requests to attend appropriate training, practices using standardised assessment with another student etc.
- Completes learning diaries/reflection sheets and discusses with CE.
- Reviews learning objectives and SPEF-R to evaluate learning achievements and needs.
- Advises CE of activities undertaken to advance own learning e.g. readings completed and discussions with team members.

3. **Demonstrates initiative and takes responsibility for actions** *e.g. uses problem solving skills; offers assistance where appropriate; takes initiative for negotiating tasks; follows through agreed actions…*
- Engages in reflection on practice to identify future actions with minimal prompting from CE.
- Plans, prioritises and completes student project tasks.
- Completes tasks discussed and agreed with CE.

4. **Demonstrates appropriate stress management skills** *e.g. engages in appropriate debriefing to manage stressful situations; seeks appropriate and timely support for work and/or personal issues…*
- Uses appropriate strategies to manage workload and/or reducing stress e.g. uses prioritisation checklist, debriefs with peers, CE, contacts CESO or University etc.

5. **Responds to supervision and constructive feedback appropriately, and modifies practice accordingly** *e.g. prepares for and contributes to supervision sessions; obtains clarification of feedback from practice educator if necessary…*
- Engages actively in supervision e.g. openly reflects upon and evaluates own performance, identifies own strengths and weaknesses, brings questions to supervision, asks for feedback on own performance, etc.
- Demonstrates changes in behaviour or practice following feedback received from CE.

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3. Co-worker communication: Communicates effectively within the workplace

1. **Negotiates, collaborates and co-operates with co-workers as appropriate to workplace** *e.g. uses effective and respectful verbal and non-verbal communication with all staff; adapts level of formality as needed; negotiates and articulates understanding of roles; negotiates schedules and use of resources ...*
- Negotiates availability of resources (eg car, rooms) with team members when making bookings.

2. **Actively participates in workplace communications** *e.g. engages appropriately in discussions and meetings; responds appropriately to team dynamics; responds to requests for information ...*
- Answers service user related questions posed by colleagues where able, seeking support of CE if required.
- Effectively liaises with relevant members of MDT to aid discharge planning.

3. **Effectively explains information to others** *e.g. articulates reasoning clearly and concisely to practice educator and relevant others; utilises sound judgement to inform communications; presents information clearly in all workplace contexts; prepares and delivers effective learning and development activities as required ....*
- Able to articulate reasoning to CE in relation to actions taken when working with a service user.

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4. Communication Skills: Communicates effectively with service users and significant others

1. **Develops, maintains and closes collaborative relationships appropriate with clients *e.g. uses appropriate verbal and nonverbal skills; uses respectful listening and questioning skills; uses appropriate and respectful physical contact/manual handling; establishes appropriate boundaries; engages and maintains ongoing dialogue with service user over time ...***
- Demonstrates ability to build and maintain a therapeutic relationship with a service user e.g. chooses appropriate topics to discuss to help build rapport, discloses appropriate amount of information about self and keeps relationship focussed on service user's goals.

2. **Communicates effectively with significant others as appropriate *e.g. uses appropriate verbal and nonverbal skills; uses respectful listening and questioning skills; uses appropriate and respectful physical contact/manual handling; establishes appropriate boundaries; engages and maintains ongoing dialogue with significant others over time ...***
- Maintains ongoing appropriate communication regarding service users progress with significant others.

3. **Demonstrates responsiveness to clients/significant others *e.g. uses empathy and shows understanding of impact of disability/illness; modifies plans in response to service user wishes/concerns; responds to others' emotional status ...***

4. **Expresses reasoning/recommendations clearly, ascertains clients understanding and modifies communication as necessary *e.g. modifies language to facilitate understanding; avoids use of jargon; clarifies information; provides opportunity for questions and feedback; uses interpreter as needed ...***
- Able to modify communication to suit clients' needs as required.

5. **Shows an awareness of, and/or manages group dynamics as required *e.g. adopts designated role within a group effectively; manages issues including inclusion, power and the impact/influence of group members on each other and over time ….***
- Identifies service users who are appropriate to participate in a therapy group, referring to group selection criteria and discussing service user's appropriateness to attend group with CE as needed.
- As a group facilitator, uses strategies to promote engagement from group members.

5.   DOCUMENTATION

1. **Adheres to formal workplace documentation requirements *e.g. produces timely, accurate, grammatically correct written work; observes confidentiality; uses appropriate language, format, frequency and distribution; stores information appropriately; uses appropriate range of specialised documents…***
- Ensures all written documentation is completed- and filed in a timely manner.
- Informs CE when progress notes and reports are completed, so they can be co-signed.

2. **Writes documents in an objective manner with interpretations and recommendations supported by relevant information *e.g. uses evidence, factual observations…***

3. **Targets documents appropriate to audience *e.g. considers recipients' requirements, culture, literacy skills; adapts language, content and format accordingly…***

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6A. Information Gathering (Direct Service Provision)

1. **Identifies own knowledge/skill needs in preparation for service provision** *e.g. identifies strengths and gaps in own knowledge and skills…*
- Reviews clinical tools to identify gaps in own knowledge e.g. case management checklist, home visit checklist, initial assessment proforma.
- Identifies learning needs that are specific to caseload/setting and learning objectives.

2. **Identifies and obtains information required to prepare for service provision** *e.g. seeks and obtains general information relevant to service user illness/disability context; refers to broader information/literature as appropriate; sources existing service user/group information/history as appropriate; reasons to identify possible service user/group needs goals, parameters of OT role; considers initial service user/group needs preferences….*
- Identifies how and when to obtain information about the service user from other sources e.g. service user's family, other team members, carer, GP, chart review, etc.
- Obtains information about specific medical conditions and their likely impact on service provision.

3. **Selects appropriate methods and sources of information gathering** *e.g. identifies appropriate range of formal/Informal measures, interviews and observations; articulates potential impact of service user/significant others' characteristics/group dynamics on information gathering methods; articulates reasoning for information gathering methods chosen…*
- Selects appropriate assessments that may be used with clients in the practice setting.
- Provides appropriate reasoning for information gathering method in relation to service user.

4. **Implements appropriate information gathering methods/processes** *e.g. conducts appropriate information gathering process according to guidelines/accepted practice; selects and arranges environment appropriately…*
- Prepares the environment for information gathering e.g. adjusts furniture, removes/reduces distractions, etc.
- Conducts assessments according to protocols and/or procedures
- Prepares for information gathering method/process prior to completing with client e.g. familiarises self with scoring protocol, practices assessment tool with peers, collects objects required for assessment.
- Obtains consent from service user prior to implementing information gathering.

5. **Observes service user responses/performance during information gathering processes (individual/group)** *e.g. notices fatigue/agitation/impulsiveness/mood/attention/ concentration, quality of movement/ posture; discerns abilities and limitations influencing response performance…*

6. **Analyses and interprets appropriately the information gathered** *e.g. recognises service user and environmental strengths and limitations and the relevance to occupational performance/roles; checks consistency of interpretation with experiences of service user and significant others….*
- Scores assessments according to relevant protocol and/or procedure.
- Considers likely impact on occupational performance.
- Discusses findings with service user to identify consistency of findings with their experience.

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7. SERVICE PROVISION

1. **Collaborates with service users, significant others, and other service providers to establish/support priorities** *e.g. incorporates information gathered; considers specific service user needs/preferences; considers occupational roles and performance; recognises environmental factors; community/personal networks…*
- Uses methods and/or tools which facilitate a client centred approach to establish priorities e.g. the Mental Health Recovery Plan or Canadian Occupational Performance Measure.
- Establishes priorities by incorporating information gathered, service user's needs and preferences, occupational roles/ performance and environmental factors.
- Demonstrates awareness of service demands and makes decisions which take these into account e.g. four hour discharge targets in Emergency Department, waiting lists for outpatient services.

2. **Defines goals in objective terms** *e.g. articulates and documents individual/group goals which reflect occupational roles; uses measurable outcomes…*
- Uses the S.M.A.R.T. or other appropriate goal setting format effectively.
- Documents service user's goals clearly and concisely within relevant records

3. **Selects and/or co-ordinates service provision methods/programme (individual/group) in response to established goals** *e.g. demonstrates awareness of appropriate practice frameworks; explain rationale using supporting evidence; selects most appropriate environment/service providers; identifies available resources (human and physical); justifies decision re allocation of resources…*
- Selects appropriate community partners to meet established goals
- Articulates rationale for choice of intervention.

4. **Makes adequate preparation for direct service provision** *e.g. becomes familiar with equipment/activities/individual or group processes chosen; ensures necessary requirements in place; books shared space/resources; arranges workspace appropriately…*
- Informs team of planned intervention using appropriate methods e.g. white board in therapy office
- Makes adequate preparations in advance of service provision e.g. locates necessary items in therapy kitchen, relevant forms taken on home visits, writes location of home visit in appropriate location to inform team.

5. **Implements/manages planned service provision effectively** *e.g. complies with safety requirements; demonstrates responsive and creative practice in individual and/or group contexts; provides support /advocacy/information as required…*
- Responds to any unexpected changes as appropriate during service provision.
- Monitors and makes appropriate recommendations to aid service user's safety during sessions.

6. **Engages significant others and other service providers to support service provision** *e.g. recognises expertise of others; contacts and involves others appropriately such as family members, educators, workplace personnel, other professionals, support workers…*
- Recognises need to and engages other team members in service user's care.
- Engages service user's significant others in therapy to support OT intervention.
- Makes referrals to therapy assistants/support workers as appropriate.

7. **Prepares adequately for handover/completion of service provision** *e.g. provides appropriate information/resources to all relevant individual/group service users and stakeholders; complies with confidentiality and privacy requirements…*
- Completes, files and distributes discharge summaries as required.
- Discussed ongoing plan with client and stakeholders on completion of service provision.

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8.   SERVICE EVALUATION

1. **Identifies need to evaluate personal service provision/organisational processes and identifies appropriate evaluation strategies** *e.g. selects appropriate formal and informal methods; links evaluation methods to individual/group/project goals; consults with service users/stakeholders and other service providers as required…*
- Identifies appropriate methods to evaluate personal impact on service provision e.g. reflective practice.
- Identifies appropriate methods to evaluate organisational processes.

2. **Implements evaluation strategies during and following service provision** *e.g. reflects on service provision in action and recognises change; describes positive and negative aspects of service provision; engages in quality/continuous improvement processes…*
- Participates in quality improvement e.g. reviewing service user handouts, assisting with service benchmarking activity.

3. **Interprets evaluation information appropriately** *e.g. analyses information gathered; recognises factors that influence service provision outcomes; articulates interpretation of information in light of strategies uses, own professional skills and the broader context of environmental/service user/stakeholder factors; identifies potential recommendations…*
- Demonstrates ability to adjust service provision relating to service user/carers' responses and feedback e.g. simplifies task when service user observed to be finding task too difficult.
- Makes recommendations for client's ongoing therapy based on reviewing previous sessions with client and feedback gained from client/carers/staff members.

4. **Adapts service provision in response to ongoing collaboration and new/evaluation information** *e.g. reviews progress/outcomes with service user/stakeholders; modifies strategies if required in a timely, flexible and creative manner..*
- Collaborates with client to sets new treatment goals, once initial goals achieved.
- Adapts client's ongoing therapy based on reviewing previous sessions with client and/or feedback gained from client/carers/staff members.

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