



**RCOT Specialist Section**

**Children, Young People and Families**

##### An on-line resource to support Clinical Forums

This handbook has been designed as a working document to be used by all Royal College of Occupational Therapists Specialist Section Children Young People and families (RCOT SS – Children Young People and Families) Clinical Forums. It is stored on-line and alterations and reviewed annually.

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1. **Introduction RCOT SS Children Young People and Families**
   1. **Aims**

The College of Occupational Therapists Specialist Section - Children, Young People & Families is a branch of the College of Occupational Therapists (RCOT). The membership includes occupational therapists from a variety of backgrounds, such as occupational therapy staff and students, educators, and researchers, who have an interest in or are working with, children, young people and their families in a wide range of practice settings. There are close links to service users, carers and associated organisations

**1.2 Structure of COT SS Children Young People and Families**

The **Specialist Section - Children, Young People & Families** (RCOT SS CYPF) is led by a National Executive Committee (NEC) made up of volunteers elected from the membership at the annual review meeting (ARM). The NEC meets four times a year.RCOT SS Children Young People and Families will have an annual budget and business plan. NEC Members support fellow members at local and national levels across the United Kingdom (UK). All Specialist Section - Children, Young People &Families members must also be members of the British Association of Occupational Therapists (BAOT).

* To support members and develop and maintain good communication channels across the UK
* To provide national learning events and an annual training event
* To provide expert opinion in improving standards within children’s services across health, education, social care and the independent and voluntary sector.
* To Identify clinical advisors, form clinical forum networks as needed.
* To share and demonstrate best practice
* To raise the profile of occupational therapists working with children
* To provide resources and information via social media, web pages and newsletters
* To act as advisors and influencers for and on behalf of the profession and the College

**2 Clinical forums**

**2.1 What is a Clinical Forum?**

The COT SS Children Young People and Families has a number of Clinical forums aiming to provide a forum for occupational therapists working with a common specialist interest to shape the development of resources and policy both within CYPF/ RCOT and externally, and promote the contribution of occupational therapists within this area of practice.

Activities include

* Offer networking meetings
* Offer continuing professional development opportunities such as talks and study days
* Provide specialist clinical view to RCOT or other organisations to support policy/ guidelines etc. including response to NICE Guidelines
* Contribute regularly to CYPF journal
* Develop resources, for example website pages
* Develop written materials such as leaflets, Practice Guidelines

2.2 **Benefits of Clinical Forum involvement**

Membership of a Clinical Forum Committee provides:

* Free CPD - free access to the events organised by the Forum
* Opportunity to influence the area of specialism
* The opportunity to organise low cost presentations and study days targeted at the needs of members in the Forum.
* CYPF Bursaries - priority is given to those who are active in Groups/ Clinical Forums
* Financial help towards courses and study days.Applicants are required to submit their request to the NEC and produce a report for the journal.
* Access to NEC to provide support /advice/ training to Clinical Forums on topics such as presentations skills, social media, running a study event.
* National networking via the NEC link
* The opportunity to influence work of the NEC. and RCOT.
* Access to peer support from fellow Forum members

**2.3 Membership of Clinical Forums**

Membership is **o**pen to all RCOT SS Children Young People and Families members, but non-members are allowed to attend training events and other networking activities as the group determines (but should be charged at a higher rate than non-members). All British Association of Occupational Therapists/College of Occupational Therapists (BAOT/RCOT) members can be members of the Specialist Sections.

The RCOT SS Children Young People and Families membership information leaflet should be available at all events and non-members should be encouraged to join. Clinical Forum committees should be proactive in encouraging membership.

**2.4 Categories of membership/subscriptions**

Membership is open to BAOT members interested in furthering their knowledge of children, young people & families. The membership operates a ‘rolling’ renewal system; the membership fee is due annually from date of joining  
Annual membership fees:  
BAOT member - £35

BAOT associate member - £18

BAOT student member - £18

. **2.5 How to run a Clinical Forum - Frequently asked questions (FAQs)**

If you are interested in setting up or reinvigorating a Clinical Forum here are a list of considerations/FAQs:

**Q Who do I need to speak to if I am interested in setting up a forum for my area of practice?**

**A** Pleaseget in touch with the NEC via cypfss@outlook.com

**Q How do I start a Clinical Forum?**

**A** Do you know of others who are also interested and can assist in organising both the first meeting and possibly running the Forum? If you want to canvas ideas and gain support a first step, after talking to the NEC, could be the RCOT SS Children Young People and Families Facebook page or a piece in CYPF e news. Twitter is open to all and could attract non RCOT SS CYPF members. who might then be tempted to join.

**Q What should we do at the first meeting?**

**A** You can hold an informal meeting to discuss the interest in setting up a Forum / hold a networking meeting to discuss and plan your aims and ideas. You may want to arrange a speaker for this event to encourage attendance or may want to judge local support first.

Discuss you aims and ambitions for the forum

Make a plan for your first year’s activities

Consider who could support you

Allocate relevant actions

Link in with RCOT SS CYPF NEC or Regions and Forums coordinator through cypfss@outlook.com

**Q Where do we start?**

A After you’ve got agreement from the NEC and formed a committee you might want to link in with a local university or hospital. They might be able to offer you free space for meetings/ study days, maybe in return for reduced rates at events for a number of their students. They might also have staff that are undertaking research which they could present or other topics on which they could run a study event for example evidence based practice. You might want to contact charities or lobbying organisations that could run a session regarding recent legislation for example Council for Disabled Children. It is also worth talking to the RCOT Professional Affairs officer at RCOT who might be able to run workshops on recent briefings/ position statements or other topics.

One forum has advertised the setup of the forum via relevant company websites, for example a seating company for the Physical Disability forum.

* Gauge interests via e news and social media
* Speak to others keen to participate
* Link in with NEC Practice Development Officer – your link on the NEC
* Set a date for a first committee meeting/ launch event
* Use resources in this pack to run an event (see section 8)

**Q How do we fund events?**

**A**. £500 is allocated per forum and held centrally to cover committee travel, refreshments at meetings etc., This is held by the NEC Treasurer and receipts should be forwarded to him. However, study events are expected to self-fund, that is to say enough money is raised in admission to cover speaker costs.

**Q How many meetings a year would you suggest?**

**Forums** vary in terms of organisation. For somewhere resource production is the current aim the committee meets regularly. For others networking and study events are the focus, and a few smaller events are offered during the year with the committee keeping into contact to organise these.

**Q Are there any essentials?**

**A** All members of a RCOT SS - Children Young People and Families sub group committee must be RCOT SS – Children Young People and Families members and therefore BAOT/COT members.

* The RCOT SS CYPF NEC need a contact for your group to go on the website – personal or group email is acceptable, but it needs to be kept up to date.
* Non-members should be charged to attend events.
* RCOT SS CYPF Forums provide networking and cpd opportunities to all RCOT SS CYPF members and must be advertised nationally.
* Only RCOT Specialist Section - Children Young People and Families members are entitled to vote at the Annual Review Meeting.
* Each Clinical Forum must hold a review meeting once a year during which the committee must be formed for the year ahead and financial balance reviewed.
* Communicate your activities for the year to the COT SS CYPF NEC to be included in our annual report to RCOT - we want to celebrate the work of Clinical Forums.
* Please use RCOT SS Children Young People and Families logo and headed paper/ template for all communications and publicity
* Please only use member contact details for information that pertains to CPT SS Children Young People and Families activity. A new list is available every year and old lists must not be used.
* Communicate Clinical Forum committee names to the RCOT SS CYPF NEC Treasurer so travel expenses can be agreed.

**Q How do we report Clinical Forum activities?**

**A** RCOT SSChildren Young People and Families is keen not to over load Clinical Forums with un-necessary paperwork and duties but the RCOT SS CYPF NEC needs to hear about your activities. **Please communicate short minutes of your annual review meeting to the NEC**

**Q. How many people do we need on a Clinical Forum Committee?**

There is no minimum number, but this can be flexible depending on activity over the year. Suggested roles**:**

**Chair** - Is the main coordinator of the Clinical Forum’s activities, chairs and sets date of meetings, can assist in the organisation of study days

**Publicity Officer - publicises meetings and events**

**Finance Officer –** may not be a significant role but one committee member does need to be responsible for money accrued and spent

**Secretary** - records who is attending meetings and events. Records key elements of meetings and action plans.

**Study event lead – coordinates study events**

**Resource lead – coordinates the production of resources.**

*The running of a Clinical Forum requires teamwork and jobs can be shared as necessary. Please inform the NEC of your Chair and Finance Officer*

**Q Do we need a bank account?**

**A** Clinical Forum’s hold no monies and do not have their own bank accounts. Clinical forums have a travel budget of £500 per year for committee travel, refreshments of meetings etc. Study events should be run to cover expenses.

**Q Do we need terms of reference for Clinical forums?**

**A** No - there are terms of reference for RCOT SS Children, Young People and Families but they are not required for Clinical Forums.

**Q Do we need to have an Annual General Meeting?**

Each Clinical forum will hold and annual stock-take meeting to review past a plan forthcoming year, review their finances and elect to committee if necessary and communicate this with NEC.

There is one Annual General Meeting for RCOT SS Children Young People and Families - held by the RCOT SS CYPF NEC. This will include Clinical Forum activity

The AGM holds elections for RCOT SS CYPF NEC members to vacant roles, as necessary.

The AGM usually held at the annual conference or an event. Clinical Forum committee members are welcome to attend, as are RCOT SS Children Young People and Families members not on committees.

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**Q If our group is struggling what do we do?**

A If you are struggling to continue to run your Clinical Forum considers the following:

Offer free places on study days for those who assist in the organisation

Run fewer events in a year to reduce the workload

Always get in touch with the NEC to see how we can help

**Q What happens if the Clinical Forum has to close?**

**A** In the event of a Clinical Forum having to close down please pass

Information giving reasons and other relevant details to the RCOT SS CYPF NEC Link. Contacts will then be removed from the RCOT website.

* 1. **Terms of Reference for RCOT CC Children Young People and Families**

BAOT/RCOT Specialist Sections Terms of Reference cover all specialist sections.

For the terms of reference for the RCOT Specialist Section – Children Young People and Families, please refer to the RCOT Specialist Section website

[www.rcot.co.uk/specialist/pdf/tor06.pdf](http://www.rcot.co.uk/specialist/pdf/tor06.pdf)

**3. 0 Finance**

**3.1 Financial Guidelines for Specialist Section Clinical Forums**

These guidelines are intended to provide information necessary to ensure that the RCOT’s financial requirements for Specialist Sections are met by RCOT SS-CYPF. The Forum committee may decide to reduce the need the workload / need for a finance officer by keeping events free of charge (CYPF members only) and not providing lunch at events. It is likely that some costs will be incurred at some point however, so an identified committee member to report back to the NEC on finances is required.

**Accounting –** RCOTSS-CYPF accounting year runs from 1st October to the 30th September each year. The Clinical Forum’s Finance Officer must keep records of their Clinical Forum’s transactions.

* Clinical Forum are NOT permitted to set up or maintain their own RCOTSS-CYPF regional bank account to hold or accumulate funds. RCOTSS-CYPF is accountable to RCOT and as such we are required to comply with RCOT’s Financial Standing Instructions.
* Clinical Forums are not allowed to accrue a negative balance sheet; if Groups are struggling financially following for example a poorly attended event they should contact the RCOTSS-CYPF NEC Treasurer.
* Clinical Forums are able to accrue a surplus up to a maximum of £1000. If Regions wish to accrue a surplus exceeding £1000 then a business plan needs to be submitted to the RCOTSS-CYPF Treasurer before the £1000 limit is exceeded.

**3.2 Study Days**

* All events need to be planned with a budget in mind. When planning a study event, you need to consider whether you are aiming to break even, accrue a surplus or cover some/all of costs from the Forum’s surplus. Form C can be used as a template.
* Clinical Forums must charge more to non-members of RCOTSS-CYPF for attending events. It is recommended that the fee exceed that charged to members by at least the cost of the course to RCOTSS-CYPF members plus the annual membership fee.
* All cheques need to be made payable to RCOT when booking places on study days.
* Form C needs to be completed after an event by the Forum’s Finance Officer. This needs to be sent to the RCOTSS CYPF Treasurer with any accompany monies collected.
* Clinical Forums should liaise with NEC members, so they can avoid duplication of other recent training offers, for example those run by the clinical forums/ nearby Regional Groups.

**3.3 Expenses**

* The official RCOTSS – CYPF Expenses Claim Form (form A) must be used and is available on the RCOT Specialist Section website and within Appendix 1. All receipts must be attached and sent to the RCOTSS-CYPF NEC Treasurer after signed by the Forum’s Finance Officer
* Expense claimsmust be submitted ***within 3 months*** of being accrued. Any claims outside this period are likely to be refused by RCOT.
* Before submitting expenses forms to the CYPF SS NEC Treasurer they must first be approved and signed by the Forum’s Finance Officer.
* Expenses can be paid by BACS or cheque – details are on the expenses form.

**3.4 Paying Speakers**

* Individuals and unincorporated organisations (non-Ltd) need to complete a RCOT Contract of Services form (Form B). This must be completed and signed by the individual claiming, and should only detail the speaker fee, not other incidental expenses such as stationary, travel etc.
* Both speaker fees and incidental expenses need to be entered on to the RCOTSS-CYPF expenses claim form. This must be signed be the Forum’s Finance Officer and submitted along with form B to the NEC Treasurer with appropriate receipts.
* All other speakers need to provide an invoice for services and claim associated expenses, such as travel, using a RCOTSS-CYPF expenses form. This must be signed by the Forum’s Finance Officer and submitted to the NEC Treasurer with appropriate receipts.

**3.5 Paying money in**

**Cheques**

* Cheque payments can be taken. These must be made payable to RCOT or Royal College of Occupational Therapists.
* The forum treasurer must ensure cheques are, dated, signed and completed correctly before allowing entry to events.
* Cheque's should be collated and entered into Form G. Cheque's and the completed form G are sent to the NEC treasurer to be paid in.

**Eventbrite**

* Eventbrite can be used for both ticketing and collecting money.
* Forums are not permitted to set up their own Eventbrite and MUST only use the dedicated RCOT CYPF Eventbrite page. You will be provided with your own log in for this. Please contact the NEC treasurer to arrange this if your region does not have access. The NEC are unable to support accounts that are operated separately.
* RCOT has one bank account. It is therefore imperative that the following steps are completely promptly following your event to ensure your funds are allocated to your forum appropriately.

1) Download the tax invoice for your event. This is done as follows:  
Once in your event do the following:

* + From the left had menu select Analyse
  + Select Event reports
  + To the right of this menu you will see the following in blue 'view all reports' click this
  + Select sales summary
  + Check the box that says include fees
  + Then press download event invoice.

2) Download the payout details for your event. This is done as follows:

Once in your event do the following:

* + Scroll down to the header that days payout.
  + Under this there is a box containing the following information, date, payout method, status and amount.
  + Under the header amount is a figure in blue text click this.
  + Scroll down and you will see Export Itemisation – click PDF

Send both to the NEC treasurer as soon as possible. Please note these steps are only necessary if using Eventbrite to collect money. For events with no charge or cash on door, there is no need to complete these two steps.

**3.6 General**

* + Please send all documentation for your event together.
  + There is a strict 3-month limit on collecting expenses.
  + All forms must be signed by/authorised locally, by the forum treasurer before sending to the NEC treasurer.
  + Form B MUST be signed by the recipient this is for tax purposes.
  + Incorrect forms will not be processed and will be returned.
  + Forms that are send directly to the NEC treasurer without forum finance officer authorisation will be shredded as it is not possible to trace the source.
  + It can take up to a month for expenses to be paid from when you send them in. Please take this in to consideration and notify your speakers etc., accordingly.

**4.0 Social Media /websites**

**4.1 Website**

As a Clinical Forum you have access to develop pages and set up pages on the RCOT website. Information, which is often included:

The role of an occupational therapist in this area of practice

Suggested reading

Possible assessment and outcome measures

Useful website links

Reading lists

Information for the web site should be sent to the NEC to e-news lead for placing on the web. Please be mindful that acronyms should not be used, and writing must be clear and easy to read. Please include a timeline for posting so that events can be removed at the appropriate time.

Please keep contacts up to date on website

**4.2 What cannot be posted on the website**

Please do not place adverts, minutes, agendas and publicity for events that are being run by anyone other than the RCOT SS Children Young People and Families

**4.3 E-news**

Improvements are always being made by the NEC, who will keep you up to date with any changes via our FB page and e news.

**4.4 Social media**

RCOT will be issuing guidelines for members regarding social media in 2015

**Twitter** <http://twitter.com>

**Facebook**

Twitter allows users to send short *tweets* – messages of up to 140 characters. This is best suited to sharing news or short, “punchy” updates. You can choose to *follow* people relevant to your interests, and their tweets will appear in your *newsfeed*. You can also join in or follow conversations using ***hashtags*,** such as #RCOT2020 or #Apps4OT. Clinical Forums can use the CYPF twitter address, but develop hash tags for events or their forum. If an existing group has own account always include the main CYPF twitter and face book as well to access more members. RCOT has advice sheets on how to set up and sync social media accounts.

|  |  |
| --- | --- |
| **Good idea**C:\Users\AHolbrook\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\2M5CB0XL\MC900441397[1].png | **Bad idea**C:\Users\AHolbrook\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\2M5CB0XL\MC900441397[1].png |
| Make connections with a range of health and social care professionals and service users. | **Never** disclose confidential information about a service user or information that could be used to identify them. |
| Join in conversations about health and social care topics. | Avoid bad language and language that could be considered rude, aggressive or insulting. |
| Record your social media CPD activity. | Don’t share resources without checking that they are intended for public circulation. |
| Take the opportunity to talk about your profession and its unique value. | Don’t engage with trolls or people who are aggressive to you—ignore and block them. |
| Talk to professional organisations and policy makers about your views on important issues. | Don’t ignore genuine concerns or complaints —discuss the issue or refer them to someone who can help. |
| Assume that everything you post is public and can be seen by everyone (imagine your grandmother and boss are reading your posts). | Don’t discuss professional or academic disputes online. |
| Assume that everything you post will be available online forever. | Don’t share personal contact details, bank information, or anything else that you do not want to be publicly available. |
| Share news, information and knowledge that will be interesting to your followers. |  |
| Be positive, professional and engaging. |  |

**Courtesy of COT 2014**

**5.0 Publicity**

Publicity for Clinical Forums is an important way of disseminating and promoting RCOT Specialist Section - Children Young People and Families. There are many ways in which this can be achieved.

Use e news

* Use web pages If you want opt advertise your event further i.e. OTN and event section on RCOT website you need opt complete ad proforma which can be found at…
* Advertise local events on the web site
* Get event advertised through RCOT SS Children Young People and Families Face Book page
* Send out Eventbrite invites

RCOT SS children young people and families events are allowed three free months advertising in RCOT publications/ website therefore the advert needs to indicate that a specialist section is running the event.

Publicity materials including and consumer leaflets which can be obtained via NEC and College of Occupational Therapists and some material can be down- loaded from the website

**6.0 Accessing the Database.**

*The information held on our database complies with the Data Protection Act 1998.* ***Accordingly, it must not be used for any other purpose than advertising Clinical Forum meetings/events, and Specialist Section activities only.***

* Each Clinical forum can be provided with a list of their members email addresses on request to cypfss@outlook.com
* As membership is not set around an annual date but a rolling membership a new data sheet should be sought before every study day/ mail out and the old list should be destroyed.
* The list is provided on a password protected excel spreadsheet.
* Members email addresses must be kept private and therefore not Cc’d in a mailing but Bcc’d.
* Please add an ‘unsubscribe’ option to your emails so those that do not want to receive them can let you know and be taken off your list.

**7.0 Running a study day**

It is worth being aware of training recently offered locally so there is no duplication in an area/ clinical field.

A nominal administrative charge can be levied to members to cover speaker costs, refreshments, lunch and venue costs if a free venue not available. It is anticipated that this would be around £25 per head.

Non-specialist section members need to be charged at least the administrative cost charged to members plus the cost of specialist section membership.

The NEC has a list of speakers for Regions and Clinical Forums but many forums find speakers for part of their networking days, who are prepared to speak for free/ expenses only as part of their own networking/ dissemination of research etc. Email cypfss@outlook.com

**Quick Reference Guide**

**Finance Process for running a Study Day**

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| --- |
| **STEP ONE - PLANNING**  Decide Example  Event Splinting workshop  Speaker A. Smith  Date 10.10.2014  Venue District Hospital  Expected number of delegates 30 |

|  |
| --- |
| **STEP TWO – COSTING**  1) Outgoings Example    Venue £150  Refreshments £110  Speaker fee and Travel £150  Materials £60  Committee Travel £20  £550  2) Delegate numbers    **Break even -** 22 members @ £25 = £550  **Accumulating a surplus –** Non-members need to pay at least the cost of the course plus membership (£35).    **Spending a surplus –**Places for members can be subsidised. However, non-members need to pay at least the cost of membership plus the cost of the course to members.     1. Cheques to be made payable to RCOT. |

|  |
| --- |
| **STEP THREE**  Confirm speaker and issue   * Speakers contract (Form B) * Provide individual and unincorporated speakers with the RCOT Contract for Services Form (Form ?) and expenses form (Form A). * Advise organisational speakers that they will need to supply an invoice to cover fees and expenses. |

|  |
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| **STEP FOUR**  Send to NEC Treasurer   * Delegate cheques (Form D) * Invoices |

|  |
| --- |
| **STEP FIVE**   * NEC Treasurer banks chequesetc.,against regions’ name which is then added to regions surplus and ring fenced for their use * NEC Treasurer authorises RCOT to pay expenses and invoices, which is then deducted from the regions surplus. |

**SECTION FOUR**

**WEB LINKS/RESOURCES**

**Website**

RCOT Specialist Section - Children Young People and Families pages

<https://www.rcot.co.uk/rcotss-children-young-people-families/cot-ss-children-young-people-families>

You need to be logged in as a BAOTCOT member to access the full pages.

**Committee resources**

<https://www.cot.co.uk/professional-resources>

You need to be logged in as a BAOTCOT member to access the full pages.

**RCOT webpage & OT news advert template**

This can be found on the committee resources pages at https://www.rcot.co.uk/committee-resources/committee-resources

**Attendees certificate template**

These can be found on the committee resources pages at

<https://www.rcot.co.uk/committee-resources/committee-resources>

**Appendices and additional information**

* Speaker contract – RCOT contract for services form page 16
* Event flyer page 17
* Evaluation form page 18
* RCOT SS-CYPF Study day preparation checklist page 19/20
* Finance Banking Form page 21
* Expenses claim form page 22
* Receipt form page 23
* Directions poster pages 24/25
* E-news advert template
* RCOT webpage & OT news template – Learning Zone 29



**RCOT CONTRACT FOR SERVICES**

**(For individuals and un-incorporated organisations)**

**(For individuals and un-incorporated organisations)**

|  |
| --- |
| Name of Individual: |
| Address of Individual: |
| NI Number: |

|  |
| --- |
| Description of Services being supplied - including date(s): |

|  |
| --- |
| Agreed Amount (£ excl. VAT): |

|  |
| --- |
| Self-Employed Status:  Nothing in this contract shall constitute or be deemed to constitute the individual as an employee of the College of Occupational Therapists Ltd. The individual agrees that for the purpose of this contract they are a self-employed person and responsible for all income tax liabilities and national insurance contributions in respect of the fees payable under this contract. |

|  |
| --- |
| Signed: |
| Date: |



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| --- |
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## 

## Evaluation Form

|  |  |
| --- | --- |
| Title of Event: | |
| Date attended: | Venue: |
| SS-CYPF Region: | |
| Your Grade/Job Title: | |

**Please circle the appropriate comment:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| How would you rate the **quality** of the event? | **Very poor** | **Poor** | **Satisfactory** | **Good** | **Very good** | **Comment** |
| How would you rate the relevance to your **educational needs?** | **Very Low** | **Low** | **Satisfactory** | **High** | **Very high** |  |
| How well were the **aims and objectives** met? | **Not well** | **Poor** | **Satisfactory** | **Well** | **Very well** |  |
| What is the likelihood that the study day will **change your practice?** | **Unlikely** | **Quite likely** | **No difference (comment)** | **Very likely** | **Definitely** |  |
| How would you rate notification /advertisement of the event? | **Very poor** | **Poor** | **Satisfactory** | **Good** | **Very good** | **Comment** |
| How would you rate access and suitability of the venue? | **Very poor** | **Poor** | **Satisfactory** | **Good** | **Very good** | **Comment** |
| Any other comments? |  |  |  |  |  |  |

**What further subjects you would like to see included at CYPF study days/evening lectures?**

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| --- |
|  |

**If you would like to have more notification of events in your region please write your email address:**

|  |
| --- |
|  |

Email us on

Why not find us on Facebook   or Twitter @RCOTSS\_CYPF

 

**RCOTSS-CYPF - Study Day Preparation Checklist**

|  |  |
| --- | --- |
| Event Organiser(s): | Support to organiser(s): |
| Date: | Venue: |
| Event Title: | |

|  |  |  |
| --- | --- | --- |
| JOB | PERSON TO DO | TASK COMPLETED BY / WHEN |
| Ahead of the time | | |
| 1. Design Program and Flyer:   Include title of course, course objectives, date, venue, brief description, contact name / telephone no and closing date for applications |  |  |
| 1. Book venue |  |  |
| 1. Book/invite speakers |  |  |
| 1. Speakers contract forms sent out (available from SS-CYPF website - form B), along with program for the day and map of venue |  |  |
| 1. Advertise the event at least 3 months in advance. – Facebook, OTN , Twitter, direct email |  |  |
| 1. Use CYPF Study Day Application forms (available from SS-CYPF website), Payment must be in form of a cheque and paid in advance of event |  |  |
| 1. Invoicing is difficult and timely but if requested, use SS-CYPF proforma (available from SS-CYPF website) |  |  |
| 1. Letter of acceptance to applicants, including program outline *(even if just provisional)* and map of venue once payment received |  |  |
| 1. Book visual Aids / Equipment for speakers |  |  |
| 1. Arrange refreshments/lunch if applicable |  |  |
| 1. Name badges |  |  |
| 1. Obtain patient consent when patients used during training |  |  |
| Few days Prior to Event | | |
| 1. Ensure speaker’s contracts have been returned. |  |  |
| 1. Print Handouts, evaluation forms, sign posts   certificate of attendance found at <https://www.rcot.co.uk/committee-resources/committee-resources>  certificate of attendance |  |  |
| 1. Agree who’s introducing the speaker(s) | | |
| 1. Who will cover Housekeeping i.e. fire procedures, toilets, refreshments etc. |  |  |
| 1. Who is managing registration, name badges etc. |  |  |
| On the day | | |
| 1. Put up sign posts |  |  |
| 1. Sign in sheet |  |  |
| 1. Housekeeping |  |  |
| 1. Give out and collect evaluation forms |  |  |
| 1. Give out certificates of attendance |  |  |
| Following the study day | | |
| 1. Allocate a person to summarise evaluation forms following the event |  |  |
| 1. Thank you letter(s) to speaker and facilitators |  |  |
| 1. Write up of event for CYPF Journal |  |  |
| 1. Financial report summarising loss/ profit/ break even to SS-CYPF Treasurer (proforma and details available from LINK |  |  |
| 1. Post Speaker Payment form to SS-CYPF NEC Treasurer |  |  |
| 1. Invoice and receipts when applicable |  |  |

|  |
| --- |
|  |

*Details below will be entered into your Forum’s account and ring fenced for your use by the NEC Treasurer.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Region:** |  | **Event/Date:** |  |
| **Con**  **tact Name** |  | **Telephone No:** |  |
| **Contact Address and Post code** |  | | |

|  |  |  |
| --- | --- | --- |
| **Income £** | | |
| Members | |  |
| Non Members | |  |
| Other – specify | |  |
| ***Total Income* £** | | |
| **Costs** | | **£** |
| Speaker Fee | £ |
| Speaker Expenses | £ |
| Venue | £ |
| Catering | £ |
| Committee travel | £ |
| Stationary | £ |
| Advertising | £ |
| Materials – specify | £ |
| Other – specify | £ |
| Other – specify | £ |
| Other – specify | £ |
| Other – specify | £ |
| ***Total Expenses*** | £ |
| **Event Surplus/Planned deficit** | | **£** |

|  |  |
| --- | --- |
| **Signature and role:** | **Date:** |

 

SPECIALIST SECTION CHILDREN & YOUNG PEOPLE AND FAMILIES

**ROYAL COLLEGE OF OCCUPATIONAL THERAPISTS LTD**

**106 - 114 BOROUGH HIGH STREET SOUTHWARK LONDON SE1 1LB**

**EXPENSES CLAIM FORM**

PLEASE COMPLETE IN BLOCK CAPITALS:

|  |  |
| --- | --- |
| Name: | Signature: |
| Address (if new) | Date: |
|  |  |
|  |  |
|  | Approved by: |
| E-Mail: | Signature: |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **ITEMISED EXPENSES:** | | **Account Code** | **Amount £** | **VAT** | **Total** |
| Travel by Car (mileage) miles @ **40** pence per mile | |  |  |  |  |
| Travel by Taxi (give reason) | |  |  |  |  |
| Other Travel (please detail) | |  |  |  |  |
| Other expenses (please detail) | |  |  |  |  |
| Meals : Breakfast Lunch Dinner | |  |  |  |  |
| Accommodation: (Please detail) | |  |  |  |  |
|  |  | **TOTAL** | | |  |

 

**RECEIPT**

Date:

Received with thanks from

RCOT SS-CYPF

**COURSE TITLE:**

**COURSE FEE**

XXXXX RCOT Specialist Section Children Young People and Families Clinical Forum



|  |  |
| --- | --- |
| E news study day feedback |  |
| Name of event |  |
| Speaker |  |
| Region |  |
| Learning outcomes |  |
| Brief summary of content |  |
| Any other comments |  |

Section 1: Your details

|  |  |
| --- | --- |
| Name: |  |
| Organisation: |  |
| Address: |  |
| Telephone: |  |
| Email: |  |
| Month(s) of advert to be booked: |  |
| Total cost: |  |
| Payment type -  cheque or BACS transfer: |  |

Section 2: Your listing

|  |  |
| --- | --- |
| Date of event: Date/Month/Year  (e.g. 14 October 2016) |  |
| Title of event/course: |  |
| Organisation holding the event: |  |
| Venue: |  |
| Cost of the event: |  |
| Event description:  (To include the aims of the learning opportunity and the event’s  URL address for further information.)  Please note a maximum of 400 characters. |  |

Section 3: Bank details for BACS payment

|  |  |
| --- | --- |
| Account Name: | Royal College of Occupational Therapists |
| Account Number: | 31202928 |
| Bank Sort Code: | 40-05-19 |
| Bank Name: | HSBC |
| IBAN Number: | GB69MIDL40051931202928 |
| BIC Number: | MIDLGB2107H |
| Bank Address: | Paddington Branch, 2 Craven Road, Paddington, London, W2 3PY |

Could you please forward a printed remittance advice detailing the invoices that are being included in the payment to: The Finance Department, The Royal College of Occupational Therapists, 106-14 Borough High Street, Southwark, London SE1 1LB or email: [tracey.beadell@rcot.co.uk](mailto:tracey.beadell@rcot.co.uk)

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RCOT Specialist Section-

Children Young People

and Families Event

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RCOT Specialist Section-

Children Young People

and Families Event

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RCOT Specialist Section- Children Young People and Families Event