

Meaningful and Measurable

July 2014: Project Update

Authors: The Meaningful and Measurable team, July 2014

Between November 2013 and November 2014, researchers from the Universities of Edinburgh, Strathclyde and Swansea are working in collaboration with eight practice partners across health, social care and voluntary sectors and with wider stakeholders to explore the practical, political and conceptual factors surrounding effective use of personal outcomes information and data. This exploration includes approaches to recording and use of personal outcomes information and data and organisational factors.

Meaningful and Measurable combines action research, knowledge exchange and collaborative inquiry, enabling collection and analysis of a range of data from multiple sources. This is leading to insight into the nature and use of personal outcomes information and data as well as organisational and wider political factors.

For more information about the project, including a project briefing documents and previous reports, visit <http://meaningfulandmeasurable.wordpress.com/>

This report captures learning up to and including the Project Partners' Data Retreat and the Knowledge Exchange event (attended by wider stakeholders as well as the academic team and some of the Project Partners) in May 2014.

Practical, political and epistemological factors that influence the use of personal outcomes information and data

During Action Research Phase one (February 2014- May 2014) the eight project partners used a range of methods, including working with personal outcomes data within their organisations as well as holding group discussions or one-to-one interviews with staff at different levels of organisations. Whilst there was a range of factors reported, reflecting both the variety of organisations involved and the diverse approaches to recording and use of personal outcomes and data, some key learning points are emerging. Below is a summary of initial findings from Action Research Phase One, also developed through the Knowledge Exchange Event on 28th May.

Practical Factors

The following practical factors were identified:

- Audits of records within organisations identified positive examples of recorded personal outcomes data. However, significant limitations to personal outcomes information and data have also been identified, for example records of personal outcomes focussed practice not being as detailed as expected.

- Personal outcomes information and data is often dispersed across assessment, case notes and review files, demonstrating that more consistency is required in where personal outcomes information and data is located.
- Key aspects of infrastructure within organisations for recording and extraction of personal outcomes information and data have been identified, including administrative processes and systems, for example systems for recording assessments and reviews and/or IT systems.
- Some partners have reported that further work is required to make the shift from needs led to outcomes focused recording systems, while others report a need to achieve a better balance between qualitative and quantitative data recording,
- There is a need for greater correspondence between personal outcomes focussed practice and recording practice, for example there are instances where confidence that personal outcomes conversations were taking place is not matched with a meaningful record of the conversation.
- Greater clarity is required in understanding the decision-making processes and influences on practitioners when they are recording personal outcomes and personal outcomes conversations.

Political Factors

Within the work done so far in Meaningful and Measurable, several policy drivers that impact on both a personal outcomes focussed approach and effective use of personal outcomes information and data have been identified. The statutory partners in particular highlighted the tensions between top down performance management systems and a personal outcomes approach:

- A focus on targets, for example HEAT targets
- Performance indicators including length of time for assessments/reviews being undertaken and numbers of people being admitted to hospital on an emergency basis

Given that concerns about performance demands have continuously emerged as a strong theme through successive data retreats and knowledge exchange events, the academic team are currently working on an interim briefing paper specifically focusing on the impact of and barriers presented by predominant performance management regimes on the embedding of personal outcomes approaches. This interim paper will be made available through the MM website in August. A final paper on this theme will be produced at the end of the project.

Epistemological (Conceptual) Factors

Epistemological factors identified in the work so far, which are being explored further in Action Research Phase Two, include:

- The conceptual gap between practitioners conducting effective personal outcomes focussed conversations and recording of that conversation in a way which reflects the complexity of issues being explored.

- The interpretation of qualitative information and how to record it in a way which represents people's experiences.
- Categorisation of outcomes, for example into specific domains representing different aspects of experience, leads to questions around:
 - The extent to which such categorisation allows for the relationship between different aspects of experience to be established.
 - The purpose and scope of using measures (e.g. scale measures) to record and track personal outcomes.

Why record outcomes?

The focus on organisational records in Action Research Phase One resulted in identification of various challenges with recorded outcomes data. However, at the May data retreat, it was also evident that many of the challenges relating to recording in assessment, support planning and review pre-dates the work on outcomes. The detailed focus in Meaningful and Measurable on what is being recorded in project partner organisations had 'lifted a rock' on recording, and a lot of small creatures had emerged which now need to be dealt with. In order to begin to address this, an additional session was included in the morning of day two, with the aim of reviewing key principles around recording practice.

This session included a discussion around the critical role of recording as the basis for how the individual's story is shared, informing decision-making at the individual, organisational and inter-organisational levels. Recording *outcomes* matters because this brings the person's priorities into the picture, and should also provide a sharper focus on the purpose of involvement in the person's life.

The session also included a review of previous audits of outcomes records which identified key factors to look out for, including:

- the need to ensure clear differentiation between the output (service) and outcome (purpose or intended impact).
- an outcome which is personalised and not just high level and generic
- differentiation between the professional goal and the personal outcome
- differentiation between organisational outcomes and personal outcomes (see Miller and Cook 2012 for more examples)

The discussion also covered the importance of reviewing the individual's outcomes over time to determine whether the plan is still relevant and whether continued involvement is appropriate.

Various issues, challenges and solutions are emerging with regard to recording outcomes. Project partners also brought data samples along to the May data retreat, which stimulated table discussions about recording. The academic team are working on revised guidance on recording outcomes, based on the findings of the project and again, information will be shared via the MM website as it becomes available.

Definitions

Discussions at the Project Partners' data retreat followed up at the Knowledge Exchange event focused on developing a shared understanding of the concepts that are central to this work. Participants worked in groups to develop definitions of "personal outcomes" "meaningful" and "measurable". Engaging with these complex discussions proved more challenging than initially anticipated. Outlined below is the initial analysis.

Personal Outcomes

Personal outcomes begin with:

- What matters to/ is important to/ is essential/ of direct relevance to the person that they don't have or are under threat of losing and that they want to maintain/ not lose/ improve or achieve
- A reflection of the person's whole life
- What the person defines and desire as what makes them who they are that would have an impact on their quality of life

The process of achieving personal outcomes involves:

- Negotiation and shared understanding in the context of a relationship between the person and provider which focusses on how outcomes will be achieved and who will contribute towards achieving it
- Separating what matters to people from what matters to services
- A service context that responds to what the person wants out of life, focusses on more than goals and is attentive to whether the person's desired outcomes relates to maintenance or improvement of their situation
- A flexible approach that is not imposed by services and is fluid, situational and contextual

This leads to:

- A sense of wellbeing
- What the person wants to achieve
- Self sufficiency
- Enablement
- Contentedness
- Person living with dignity and purpose

Meaning

For the person, meaningful personal outcomes information or data:

- Is about what matters to them and why and what feels right for them
- Is about what would have a useful impact on their lives, and about what works for the individual as they define it
- Data/ information in which they recognise themselves and in which they feel valued and listened to
- Reflects the whole person – not just their condition or care package
- Helps the person feel that they are contributing
- Is relevant and makes a difference

For the service, meaningful personal outcomes information or data:

- Is about a shared understanding of what would have a direct and useful impact on life, enabling a process of negotiation and exploration
- Is contextualised and links back to personal outcomes
- Is used to influence decision making for individuals
- Is meaningful for use in planning and providing services
- Is understandable to everyone who needs to understand it, enabling all involved to understand what matters to the person
- Reflects conversations in which people recognise themselves
- Is accurate (cannot be manipulated to mean something other than
- Helps to prioritise support for individuals

Measurement

Definitions of measurement in the context of personal outcomes information and data :

- Is a record of the change/ difference/maintenance that an intervention from services has supported and allows progress to be defined consistently over time: “can see how much of it there is “here” compared to “there” or “now” compared to “then”
- Defines whether an outcome has been achieved or not and is recorded/ captured in a way that can be pulled off in a standard way
- It enables evaluation of a situation, knowing and evidencing whether something has been achieved
- Provides understanding as to whether something has been achieved, and if not, why not?

When applied to personal outcomes information and data, participants in the discussions raised some questions:

- Is experience measurable?
- Measurement requires common, unambiguous understanding – are these factors present in personal outcomes?
- Can you attribute services to the achievement of personal outcomes?
- Can achievement be aggregated?

Further analysis of this data, including analysis of transcripts of the discussions which took place alongside the development of the definitions, is needed in order to fully reflect the complexity surrounding these concepts.

At this interim stage, what is emerging is a picture of challenge in translating outcomes that are genuinely meaningful to individuals into information and data that would be considered “measurable” in the context of the predominantly quantitative and standardised service improvement and performance management culture.

Looking forward

The next 4-5 months of the project will involve further action research within all eight partner organisations, through which many of the areas that were the focus of phase one are being explored in more depth. Alongside this, the academic team continue to work with data from the project, developing eight case studies based on each of the project partners in order to develop a more in-depth understanding.

Outputs of the work will include:

- An interim paper on the role of predominant performance management regimes and their impact on and barriers presented to implementation of personal outcomes approaches
- Reports from each of the project partners, developed with support from the academic team
- The Joint Improvement Team’s “Talking Points” (Cook and Miller 2012) and “Recording Outcomes” (Miller and Cook 2011) will both be updated based on learning from the Meaningful and Measurable project, providing evidence-based guidance on how to implement a personal outcomes approach.
- A policy briefing document based on the work
- Academic papers, which will explore: the methodology used in meaningful and measurable; defining personal outcomes, meaning and measurement; the tension between performance management culture and a personal outcomes approach.

Key dates

May 2014 – September 2014: Project Partners and academic team working on Action Research Phase two; academic team working on analysis of case study data and further development of emerging themes through collaborative inquiry

3rd – 4th September 2014: Project Partners Data Retreat

16th September: Knowledge Exchange Event. The emerging findings of the work will be presented, with an opportunity for wider stakeholders to interact with and develop the themes.

September – November 2014: academic team and project partners working on final analysis and development of outputs.

2nd December: Final event for national stakeholders