

# Meaningful and Measurable

## October 2014: Project Update

### About the project

Since November 2013, researchers from the Universities of Edinburgh, Strathclyde and Swansea have been 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/>

### Update on project extension

In light of the extra work undertaken by the practice partners in the early stage of this project, to better understand the nature of their personal outcomes data, the project team have requested a three month 'no-cost extension' for the project from the Economic and Social Research Council. This extension allows the project partners the extra time required to complete their action research cycles, putting their findings into action. Partners are working to complete a final report from their projects by the middle of January 2015. These reports will be made available at a dissemination event to be held in February 2015, replacing the KE event originally planned for 2<sup>nd</sup> December.

### About this report

This update report is the third report from the Meaningful and Measurable team and presents some preliminary findings relating to recording outcomes, as well as the analysis and use of qualitative and quantitative data on personal outcomes across partner organisations. In addition the report includes some reflections on our research process and summarises the next steps as the project enters the final few months. The data on which this report is based was primarily collected at the third project 'data retreat'. Many of the discussions at the data retreat were in turn informed by audits of records within the organisations, and interviews within the organisations. This two-day event was held in September 2014 and was attended by representatives from all eight partner organisations as well as the academic team.

## Recording outcomes – ‘Lifting the Rock’

In our last update (July 2014) we reported on a range of recording issues which partners wanted to address. These included the dispersal of outcomes information across different records, a need to ensure that conversations about outcomes were accurately reflected in the record and further work needed to support the shift from needs led to outcomes focused recording. During the third data retreat organisations reported further on their investigations into recording. Some of the key findings were reported as follows:

The paucity of recording in formal documents such as assessments and support plans was a common theme. Several practice partners identified that the ‘good stuff’ was to be found in informal documents such as case notes. They therefore wanted to work with practitioners to support more consistent recording in formal documentation.

Several partners were planning to further investigate factors which inhibit recording of personal outcomes in formal documents. One common factor was that practitioners feel pressure to justify service interventions by focusing on deficits.

Another challenge identified was the categorisation of outcomes from qualitative conversations. This related to the fact that one factor in an individual’s life might relate to several outcomes, presenting challenges to recording.

A further theme was the impact of different policy agendas on the record. We previously reported feedback that HEAT targets impact on recording. At this retreat, there was specific discussion around the impact of delayed discharge on recording about older people in particular, with reduced focus on the outcomes for the person. This was contrasted with the impact of the recovery agenda on people with addictions, where a more enabling and outcomes focused approach was evident.

## Qualitative data analysis and use

Several partners selected a sample of cases and looked across records to collate as much qualitative data as possible. The details of the approaches adopted will be included in the final reports for each individual project. A common experience was having to look beyond formal support plans and reviews and to include case notes to obtain a full picture of the individual.

Information officers repeatedly referred to the parallels between the shift from tick box, standardised assessments to the more qualitative conversations associated with outcomes based practice, and the shift from purely quantitative, statistical approaches to information management to engaging with qualitative data about personal outcomes.

The same individuals involved reported how engagement with qualitative data had improved their *understanding* of the complexity of the lives of the people using services, of the job that practitioners do and about the interaction between different stakeholders around outcomes.

Qualitative analysis of the data supported the development of ideas about what good recording looks like, influencing the approaches adopted to action research within the organisations.

### Quantitative data analysis and use

The quantitative data referred to in this project is generated through inclusion of scale measures in various ways in personal planning and/or review documentation. Partners are using a range of scale measures. The academic team are developing a table to highlight the utility and applicability of the various scales in different contexts. This table will highlight tensions, such as the use of the scale measure “unmet, partially met, met,” and that visual scales were identified as a helpful aid to practice.

The introduction of scale measures needs to be handled with caution to ensure that the quality of the conversation between practitioners and people using services is not undermined by a focus on measurement.

Indicators of outcomes can be measured in ways that conform to conventional understandings of reliability and validity. Personal outcomes data, as reported by individuals, is captured as part of a co-productive interaction. It is influenced by a range of factors, including how the person feels that day. Therefore, although the data has good face and internal validity, it does not conform to traditional (psychometric) notions of external validity or reliability.

### The research process: learning so far

One of the clear messages to emerge from the data retreats in particular, is the benefits of a collaborative approach. The exchange of perspectives, and the opportunity to ‘live a rock’ on what was discovered in organisational records, has resulted in a range of assumptions being challenged, and new learning for all participants.

The practice partners while engaged in their action research projects, have adopted a range of methods and approaches to exploring personal outcomes data and its use. While this will present some challenges in pulling the findings together, this will enrich the overall findings.

### ***Next steps***

In the interim the academic team are engaged with a range of policy, practice and research stakeholders, across the UK and internationally to explore how practical recommendations from the project might be taken forward. This includes looking for further funding to support research and knowledge exchange activities in this area.

The team are working to produce the following outputs:

- An overall accessible project report, including reports from each project partner.
- 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

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- 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.

The project partners are meeting for a final one-day data retreat on 2<sup>nd</sup> December. Some of this day will be devoted to completing individual project reports. We also plan to host a knowledge exchange event in February and will confirm the date shortly.

**Meaningful and Measurable (an ESRC funded project) is led by the University of Edinburgh, the University of Strathclyde and Swansea University**

in partnership with Angus Council, Bridgend County Borough Council, Clackmannanshire Council, East Renfrewshire Council, Edinburgh City Council, the Joint Improvement Team (JIT Scotland), Moray Council, Penumbra, the Scottish Community Care Benchmarking Network (SCCBN), Stirling Council, VOCAL and the Social Services Improvement Agency (SSIA)