



MEANINGFUL AND MEASURABLE: FEEDBACK FROM KNOWLEDGE EXCHANGE 3

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The ESRC funded *Meaningful and Measurable* project (2014-15) hosted its third and final knowledge exchange event on 23rd February in Edinburgh. The purpose was to test out project findings and their potential impact with diverse stakeholders, and to consult on future priorities. Findings were presented by panels consisting of 3 or 4 project partners, organised around four themes: recording, measuring, analysis of qualitative data and use of data. At the end of the day, delegates were asked to write answers to 3 questions. This paper reports on the main themes arising through brief analysis of the responses.

58 people attended the event. Although most delegates were from health and social care, children's services were also represented. 41 people completed the questionnaire, with most identifying their role (see appendix).

Question 1: Learning from the day

All 41 respondents answered the question 'What have you learned today?' A set of themes was identified from reviewing all of the feedback. The table below sets out the themes, including the number of times each theme was referenced.

Table 1: Key themes from feedback on learning from the day

What have you learned today?	
Differences yet similarities between the projects	19
The challenges faced	11
The importance of the conversation	11
The importance of recording	11
Measurement	9
Qualitative data	7
The role of the practitioner	6
Links to commissioning	2

Differences yet similarities between the projects

The most common response to what participants had learned during the day centred on shared learning and common themes identified by the partners. In many cases the shared agenda appeared to provide reassurance about consistency of approach despite significant differences between partners

How much common ground there is - I'm surprised (and pleased)

There was a sense that there was less confusion as a result of the project:

That the project has explored diverse aspects of the personal outcomes journey, and progressed the debate in both 'measurable and meaningful' ways. Great to see the level of discussion and understanding starting to permeate agencies – and people no longer seem confused

One example highlighted a common principle across presentations:

That a bottom up approach is accepted as vital

While most comments acknowledging differences between projects also identified commonalities, a few comments only identified differences. One of these focused on diverse approaches to data capture, while another noted the differing emphases of the partners, and a third highlighted the different stages the partners were at:

Coming without attending previous events, I've learned about the background to the different projects and the different stages each organisation was at

The challenges faced

Although many of the comments above identified common ground, several indicated that people had a greater appreciation of the complexity involved:

How challenging capturing and analyzing and reporting outcomes info is!

A few comments identified specific challenges which could present barriers:

Tensions with performance management

For one participant, it was the challenge of aggregation which had struck them:

Complexities of aggregating outcomes info

The last comment may well be a contributory factor to the next comment:

There are many years worth of analysis and experience recorded within this project which is extremely thought provoking but I am wondering how this will help at a national level

The importance of the conversation

The importance of the conversation to an outcomes focused approach, while not a new theme, was one of the most commonly referenced learning points, which can perhaps be best summarised by the following:

Reinforced importance of personal outcomes focused conversations. The conversation should trump all

One participant noted the need to ensure that outcomes are recorded whether or not the practitioner felt they were in a position to deliver the outcomes or not:

Support practitioners to support outcomes focused conversations that can be recorded regardless of whether the practitioner is able to help them achieve their goals

The importance of recording

The session on recording outcomes was cited as providing some key learning. One participant summarised the view of several others in identifying the following take home message:

I think the notion of 'elevating the status of recording' is something I will take away

A few identified approaches which they felt they could also be embedded:

But lots of useful insights to inform our implementation, and our guidance for staff in recording in our IT system

One participant noted the importance of the person's 'voice' being recorded:

Importance of service user 'voice' in recordings and assessment

Measurement

Some of the feedback on measurement linked it to other aspects of embedding an outcomes approach:

More depth on recording and measurement and use of information

Two comments suggested that the participants were very interested in messages about the limitations to the measurement of outcomes:

Numbers only tell a small part of the story

Qualitative data

There were various comments on learning about challenges and possibilities of using qualitative data:

Recognition that qualitative data can provide robust evidence/info that can lead to improved practice and can meaningfully inform commissioning practice

The role of the practitioner

Some of the comments in the sections above related to supporting practitioners with conversations and recording. The six comments counted in this section related more generally to supporting practitioners to embed personal outcomes, using collaborative approaches to achieving this:

Need to engage practitioners – recording outcomes and conversations etc, needs to make sense to and have value for them. A 'bottom up' approach is needed

There was also reference to the need to converse across agency boundaries:

Permission for staff to spend time and share learning in open/honest way with colleagues in other organisations

Links to commissioning

Two comments identified learning about links between personal outcomes data and commissioning, with one noting the need to make this a focus for the next stage of development:

The next level of the Talking Points journey and how this can inform frontline, commissioning and strategic planning

Question 2: Applying the learning

39 people responded to the second question “In what ways might you apply this learning?” Several of these answers consisted of two or more components.

Table 2: Key themes from feedback on applying the learning

In what ways might you apply this learning?	
Embedding and practice support	16
Recording	11
Links to policy	6
Links to inspection	5
Dissemination of project findings	5
Links to commissioning	4
Links to other partners	2
Use of qualitative data	1

Embedding and practice support

The most common responses to the question about applying the learning centred on embedding the approach and supporting practice. Various ways of embedding personal outcomes in systems were identified, including rethinking the approach to review in one organisation, outcomes focused discussion with colleagues and in other cases, and in one example simply copying what had worked elsewhere:

Copying methods/processes that others have found to work

There was also one reference which linked further development to SDS:

To revisit key aspects of 'practice' development, especially linked to SDS

Several comments referred to the need to revisit training or staff development

Look again at how we embed the feedback to frontline practitioners which in turn shapes their practice = recording = data analysis = learning = frontline practitioners

One of these comments referred to England specifically:

Use learning to help with practice development in England

Two comments identified the need to support more enabling practice:

From fixer to facilitator

Recording

Nearly half (5) of the 11 comments on recording referred to plans to improve tools and IT systems to support improved recording of outcomes:

I am using insights from today to inform development and implementation of our recording system. I am testing the new screens for roll-out in April. It is quite exciting! Next I will be working on training and guidance for systems users to help ensure we capture good outcomes and can report this in aggregate formats

The remainder were about supporting practitioners in various ways to improve narrative recording of personal outcomes:

I will take steps to improve our recording practice and think about how we can incorporate into our learning and development

Links to policy

There were six comments from people with policy links, indicating how they intended to use their role to promote personal outcomes:

Following up some of the presenters and attendees to help inform the national guidance notes I am writing on commissioning for outcomes

Two such comments came from Welsh participants:

Work with our team of practitioners who are developing/testing the national approach to reporting within a national outcomes framework in Wales

Links to inspection

There were 5 comments about inspection, reflecting the fact that there were several participants from the Care Inspectorate. The comments included commitments to directly apply a more outcomes focused approach in inspections:

We increasingly focus on service user outcomes in relation to how we assess and grade services

With a couple of comments reflecting a more strategic position:

Informing colleagues' work in developing approaches to using personal outcomes as part of my knowledge management role

Dissemination

Five participants wanted to disseminate the findings to colleagues, with a few of these further commenting that digestible formats would help:

Distil key findings for broad audience

Links to commissioning

Four comments expressed a commitment to improve links between personal outcomes data and commissioning, with two of these reflecting a need to develop clearer methods for doing so:

Growing knowledge that we need to think about our overall approach to using personal outcomes data in relation to commissioning

Links to other partners and use of qualitative data

Additional comments included two about improving other links, and a further comment expressing a commitment to increased use of qualitative data.

Question 3: Priorities for personal outcomes

39 people responded to the question “What do you think the priorities are now for personal outcomes?” Most responses consisted of two or more recommendations.

Table 3: Key themes from feedback on priorities

What do you think the priorities are now for personal outcomes?	
Practice support and development	21
<i>Supporting culture change in practice/supporting staff</i>	9
<i>Focus on improving recording</i>	8
<i>Embed throughout assessment, planning, monitoring and review</i>	4
Further embedding the approach at the macro level	15
<i>Integrating across systems</i>	5
<i>Integrating across systems at the local level</i>	4
<i>With reference to integration</i>	4
<i>With reference to SDS</i>	2
Disseminate evidence about personal outcomes approaches	5
Use of qualitative data	8
Commissioning	9
Improve performance systems	9
Public engagement	2
Measurement	2

Practice support and development

The most frequently identified priority was practice support and development (21 comments). The most common sub-theme was culture change at practice level with a strong emphasis on the need to ensure that staff are sufficiently supported. This included improving outcomes for staff, such as wellbeing and listening to staff. The need for better outcomes for staff was linked in several cases to improving outcomes for people using services:

Getting authorities to recognize the importance of 'listening' to the frontline practitioners to support teams to work in a way which engages meaningfully

Enabling staff to enable people to articulate their needs and wishes

The second most common sub-theme on practice development was recording outcomes, with one participant acknowledging a need to “*make recording 'manageable.'*” Two comments stated that good conversations and recording should be considered in tandem:

...help establish a greater appreciation for the effects of conversations, importance of recording assets and personalization

Remaining feedback focused on the need to ensure systems support practice, and embedding outcomes across assessment, planning, monitoring and review. One person noted that budget constraints was restricting options and creativity.

Embedding the approach at the macro level

The second most commonly identified priority was the need to further embed the approach at the macro level (15 comments). 5 comments recommended that the approach should be more prominent across national organisations

To remain prominent, be more embedded across sectors (SG, NHS, NES, CI, SWS)

A further 4 comments identified the need for a whole systems approach at the local level. One of these reflected on the different approaches taken by project partners, identifying that each organisation needed to find its own way:

Flexibility and variety in approaches has been useful, and perhaps a 'personalised' approach to personal outcomes is the way forward and a 'one size fits all' solution isn't

Five participants emphasised the need to embed the approach in the context of integration, seeing personal outcomes as a positive focus for the agenda, with one delegate urging caution:

Must not let the approach be subsumed by the 'noise' of integration

Two participants recommended that SDS be '*underpinned*' by personal outcomes.

Disseminate evidence about personal outcomes approaches

There were several references to the need to ensure that evidence and learning, including the findings of the Meaningful and Measurable project were broadly disseminated. This included a need for accessible formats:

Accessible information, support and evidence for staff in health and social work

Use of qualitative data

8 comments identified further use of qualitative data about personal outcomes.

Addressing systemic constraints to use of qualitative data

While some of these related to the potential utility of qualitative data in general, several linked to two themes discussed in separate sections below, namely, as in the following case, use of qualitative data or stories in relation to commissioning:

Use stories to improve services including commissioning

As well as in relation to performance management

Making space and time to grapple the meaning made from bringing qualitative data and quantitative 'performance' information together – at all levels of system

Improving performance systems

In addition to the recommendation for qualitative data to be used for performance, there were other comments on performance management. The emphasis was on prioritising locally generated information, while working out ways of linking this local data to national outcomes

Simplifying and illustrating how it taps into the national outcomes

Commissioning

There were 9 references to the need to advance links between personal outcomes and commissioning. As well as recommendations to include qualitative data, there were several suggestions for a bottom up approach, which involved engagement between practitioners, providers and commissioners.

As conversations are so important can we have more between assessors, commissioners and providers?

The aim was identified as improving understanding of how to work in this way, and to produce guidance to support the work.

Public engagement

Two people wanted to see more direct work with the public on this agenda, with one arguing for a movement of people using services and another seeking public education work on personal outcomes

Need to educate the public as well as staff on the importance of building on individual strengths

Measurement

There was only one reference to measurement specifically:

Determine what we are measuring and why

Any other feedback

19 people responded to 'any other feedback.' The comments were all positive, and mainly identified aspects of the day which participants found useful or interesting:

Great opportunity to mix practice expertise with academic expertise

I think the 8 organisations are to be commended for sharing their work, the learning etc. in a really open and honest way – very helpful

Excellent event – very informative. Liked the panel structure

Conclusion

Key themes emerged from questionnaire responses at the KE event. There was a sense that the conversation about outcomes has moved on. Despite the fact that each project had a different focus, core common principles were evident, with a shared and clear understanding of the importance of recording personal outcomes and how recording links to practice. The importance of organisational approach and culture were highlighted, with the emphasis on supporting practitioners and taking a bottom up approach, rather than blueprinting one method for implementation. Regarding future priorities, supporting practice remained central. The use of qualitative data was a strong theme, which in turn linked to two other key priorities; progress with outcomes and performance (particularly in the context of integration) and with outcomes and commissioning. While measurement was the focus of one of the panels, and measures did feature in a few comments, this theme was muted as compared to previous events.

Further information

<https://meaningfulandmeasurable.wordpress.com/>

<http://personaloutcomescollaboration.org/>

Appendix: Delegates who completed questionnaires

(NB: 41 forms completed, 39 answered this question. 31 noted role/designation)

Participant designations as recorded on the forms

Lead for outcomes, Joint Improvement Team
SDS/integration workforce advisor, SSSC
SDS implementation
Performance and planning, social work, Fife
NHS Lothian strategic planning
Joe McGhee, Organisational Development, Care Inspectorate
Regulation – complaints inspector
Gerry Sullivan, Depute Head of St Mary's secure unit
Robin Paterson Moray CHSCP
Service manager statutory sector
Strategic inspector – Care inspectorate
Academia/health policy
Ellen Daly IRISS
Information communication technology
Jill Derby, service development officer, West Lothian
Tim Warren, Alliance
University
Performance and info service manager, Falkirk
Phd student, Edinburgh University business school
June Findlater, East Ren CHCP RES manager
Maureen Chalmers
VOCAL
City of Edinburgh Council project partner
Stirling Council Assessment and care management
Childrens services
Improvement services
Care Inspectorate policy analyst
Gerry Nosowska, Practice improvement in English social care including work for
RIPFA and the college of social work
Bridey Rudd, Penumbra
Nigel Henderson, Penumbra CEO
Scottish Government H and SC integration team