

Mapping the terrain: Report from Knowledge Exchange Event, 5th February 2014

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

The Meaningful and Measurable Knowledge Exchange Events (5th February, 28th May and 15th September 2014) provide a forum for wider stakeholders with an interest in personal outcomes approaches, Project Partners and the academic team to explore and develop the emerging themes. The events also enable the Meaningful and Measurable project to remain situated within the wider implementation of a personal outcomes approach within Scotland and beyond.

The first half day KE event, held at The ALLIANCE in Glasgow on 5th February 2014, focussed on:

1. Introducing wider stakeholders to the Meaningful and Measurable project, its background, planned activity and the themes that were emerging from the first 2-3 months of the project. This included a presentation from Penumbra, one of the Project Partners.
2. Interactive discussion of the nature of and barriers to effective use of data within a personal outcomes approach. This provided an opportunity for the Meaningful and Measureable project to capture views and experiences on a wider scale as well as representatives from organisations at various stages of implementation having an opportunity for peer learning.

As well as the academic team and representatives from some of the Project Partners, a range of health, social care and voluntary sector organisations were represented at the meeting, including: City Councils (Midlothian, Dundee, Edinburgh, Falkirk, South Ayrshire, West Lothian, East Ayrshire, Stirling, East Renfrewshire CHCP); NHS-based organisations (NHS Lothian, Glasgow NHS); Voluntary Sector Organisations (SCVO; The Alliance; Richmond Fellowship; Waverly Care; Community Lives Consortium (Wales); Voluntary Action North Lanarkshire; Thistle Foundation).

Part one: presentation of background and planned activity

Background to Meaningful and Measurable

As well as outlining the overall direction of the project, the role of the Knowledge Exchange events was also set in the context of wider activity.

Summary of presentation

Meaningful and Measurable originated with a research project at the University of Glasgow (2004-2006) which explored the outcomes important to people using services. This led to the work undertaken by Ailsa Cook and Emma Miller in conjunction with the Joint Improvement Team in which *Talking Points* (formerly UDSET) was developed. Since then, there has been an increasing emphasis on the importance of *data* within a personal outcomes approach. Meaningful and Measurable itself emerged from a data retreat in March 2012 when many of the partner organisations gathered to begin to develop a shared language around practical and theoretical tensions surrounding the capture, analysis and use of information on personal outcomes.

Meaningful and Measurable is rooted in the three core elements of personal outcomes focussed practice designed by Cook and Miller (2013: 13): engagement with service users and carers, recording of information on outcomes and use of information for decision making.

This presentation also highlighted wider developments supporting personal outcomes by a range of organisations in Scotland:

- Talking Points Support Programme (Joint Improvement Team), which includes
 - Talking Points introduction
 - Good conversations
 - Data analysis
- IRISS resources
 - Leading for Outcomes
 - Measuring Outcomes
 - Qualitative data analysis
- Work done by the Alliance:
 - 'We've got to talk about outcomes'
- Work done by NHS Education Scotland (NES) and Scottish Social Services Council (SSSC)
 - Sliding doors
 - Work with dementia demonstrators
- Opportunities for education at the University of Edinburgh
 - Personalisation and Outcomes / Use of data CPD

Activities and timeline

A brief presentation described the Meaningful and Measurable project, including the purpose of the Knowledge Exchange event and where it sits within the work as a whole. For further information about the project, including activities and timelines, please visit

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

A more detailed report of the data retreat which was held in January 2014 can also be found on the website, or e-mail meaningful.measurable@ed.ac.uk

Presentation from Project Partner: the Penumbra story

The presentation from Penumbra began by highlighting aspects of personal outcomes focussed practice within the organisation that are working well, with emphasis on the tool used: I.ROC. Penumbra has experienced positive feedback about I.ROC, which is reflected in increased use of the tool. Within the organisation, training has been rolled-out successfully and evidence from I.ROC is being used in organisational reports and applications for further funding. As an organisation seeking to implement a personal outcomes approach through the use of a quantitative tool, Penumbra has identified questions which they wish to explore. These include questions around the effectiveness of the organisational database, the extent to which outcomes-focussed conversations taking place alongside completion of I.ROC are being captured alongside recording of scores and the extent to which those conversations are outcomes-focussed.

To explore these questions Penumbra has therefore planned activities including service audits, focus groups with staff, observational study and more reliability testing. Within Meaningful and Measurable, Penumbra is going to be working in collaboration with Angus Council (another Project Partner) in the Action Research phases of the project. This collaborative approach emerged from identification of similarities in the two organisation's baseline summaries, presented and discussed further at the data retreat in January 2014 (see data retreat report for further detail). Both organisations are using personal outcomes tools to record personal outcomes data and have confidence in the scores from those tools. What they are less clear about is the accuracy and consistency of the qualitative data that is being recorded alongside this.

Meaningful and Measurable: Summary of Penumbra and Angus' collaborative Action Research Project (phase one)

Aims: To explore to what extent outcomes focused conversations are reflected in the associated reporting practices.

Research questions: In order to explore this, the two organisations identified the following research questions:

- What do we mean by 'good' (quality) recording? What do we mean by good 'quality' data?
- To what extent do staff (practitioners and frontline managers) understand outcomes?
- What are the factors associated with variation in recording? E.g. Does this reflect:

- Variation in recording itself?
- Variation in the 'quality' of conversations?
- Variation in practitioner understanding of outcomes?
- Other influences, such as variations in local priorities and constraints?
- What are the factors that support 'good' recording of outcomes?
- In what ways has introducing outcomes focused recording influenced practice and relationships?
- What are the learning points for training, practice and supervision?

Methods used: These research questions will be explored through observed cross-organisational semi-structured interviews. That is, representatives involved in Meaningful and Measurable from each of the organisations will interview six staff from the other organisation with a member of the Meaningful and Measurable academic team observing the interviews. Thematic analysis of anonymised interview scripts will explore the research questions outlined above.

Part two: wider stakeholder discussion

Following these presentations, wider discussion took place in four smaller groups. Led by a facilitator, each group was asked to discuss the four questions listed below. Responses were recorded on post-it-notes and audio recordings were made during the group discussions.

Summary of Group Discussions

The following sections summarise the areas covered within the group discussions. Data is taken from the post-it-notes and anonymised recordings of the group discussions.

1. What does effective use of data within a personal outcomes approach look like?

Emerging from this question was a sense of the quality and content of the data. It needs to be rich, responsive and meaningful/ understandable to all those involved in the process (people accessing services, staff and managers):

I think it's a lot about having a shared organisational vision, as well, of what you're trying to... You know, what is your service about, what are you trying to achieve with people? And actually having a shared understanding across the whole organisation. I think building it in to organisational systems so that the conversations you have between staff and managers are outcomes-focused, that it's built in to supervision – so it's not just something we do with service users. It's part of... It's your ethos. (from audio recording of group discussion)

Similarly, there was reference to the need for valid and reliable data that is consistent, that measures and tracks progress and that reflects analytical practice. Linked to this was association between effective use of data and positive impact on people accessing services, with groups discussing the links between effective personal outcomes approaches and enablement, empowerment, recovery and ownership by people who are being supported. Effective use of data needs to be enabling and empowering for staff. On an organisational level, effective use of data would cut across agencies and also include that data being used in service improvement, performance management and commissioning:

The other thing I think from a Third-Sector perspective is having outcomes-based commissioning and contracting. Because it can be difficult when you're... I think we're working with statutory organisations who want to contract with you around outputs. And you're saying to them, "No, actually, we want to look at what we achieve with people."
(From audio recording of group discussion).

2. What can we do to promote effective use of data within a personal outcomes approach?

The focus of discussions around how to promote the effective use of data within a personal outcomes approach included systems (for example IT systems and organisational systems) and tools used in the process. The quality of and consistency in recording personal outcomes data was also discussed as well as the need for recording to be both manageable and proportionate. The topic of aggregation of data was also discussed, with one participant describing the tension they had experienced between opening up a range of communication methods to be as inclusive as possible and the need to aggregate the data, not only for commissioning purpose but also for people using the service to be able to identify with others who had similar experiences:

We've supported people to develop their own personal statements in whatever media – so a lot of people video, a lot of people have used, you know, slide shows. Someone has produced a ___ guide. And it has very strong ownership of people but we've almost lost the ability to aggregate any of that information. And that's a problem for two reasons. One, because we've had to engage with the commissioners in terms of going and looking, and talking to people. Which is great. That's very positive. But secondly, it's been difficult for the people themselves to share their experiences to... To find out the common ground between them.
(from audio recording of group discussion).

There were overlaps between the factors that promote effective use of data and the structures that enable it – see below for organisational structures.

3. What structures enable use of data within a personal outcomes approach?

The key thing is that we need to have ___ systems that enable effective capture of the outcomes that people want to record. And the... The results of that recording need to be available in user-friendly formats. By which I mean at an individual level you need to be able to see the evidence of the outcomes and the improvements or the deteriorations, or the standing still of the scores over time. So there needs to be a way for the IT system having captured the snapshots of what we've used to be able to present that in a way that the practitioner can easily understand (audio recording of group discussion).

Organisational structures that enable effective use of data include a whole system approach that cuts across all sections of organisation and has clarity of purpose. This would include training, support and supervision for staff (including training which highlights the impact of poor recording):

Key to that is providing staff with the support – frontline staff particularly. That they have the right tools to help them capture the evidence. Because if we're not able to do that at the frontline and give the staff the support and any training that they need, and the use of the tools and the approach that they're implementing, then we're not going to get... Get all of that information captured (audio recording of group discussion).

Organisational culture and leadership that promotes the use of information across the organisation were also viewed as key elements, as were structures that promote ownership of personal outcomes for people accessing services, for example in review processes.

4. What are the barriers and threats to effective use of data within a personal outcomes approach?

Barriers and threats identified within the discussion included non-engagement or resistance to the approach at all levels of organisations. Linked to this were other agendas that can compete with a personal outcomes approach, either because they are counter to the approach or because of multiple demands on time of individuals and organisations. Areas identified were performance management, integration, austerity, health and safety, risk aversion, requirements of scrutiny bodies and a contract culture. There was a strong emphasis in the discussions on the need to ensure that individual ownership of the outcomes was not lost amidst these pressures:

The most important thing you see is the person themselves recognising this is mine. This is what matters to me.

Other barriers identified were lack of training and time as well as existing IT systems and the challenges of developing systems for recording and analysing qualitative data:

I'm torn, actually, around the aggregation of the data because I am worried about losing the meaning of it. But I think it's possible to aggregate the data in a useful way. So... The other screen that I'm creating, apart from the display of the outcomes is I'm ___ a link between the care plan, the service user's care plan, and the outcomes. So if you're adding a new service to a care plan, you have to create a link to one or more of the outcomes. Unfortunately there's not a simple, one-to-one relationship between an outcome and a service, because one can lead to three, and three can lead to one.

Towards the end of the event, the groups came together for a final discussion. In summing up the discussions, Emma Miller reflected on ways in which the discussion at this first KE event has confirmed that the three core elements of an outcomes approach (engagement, recording and use of information) can't be separated and that practice can't be separated from use of information. We now need to explore further the quality of the three components and how they link to each other – quality of engagement, recording and use of information. Everyone who had taken part in the discussion was assured that their contributions at this event are not simply the usual collation of post-its that don't go anywhere – input from this event will be used in taking forward the work as a whole.

Evaluation of Event

Evaluation forms completed on the day of the event included the following comments:

*The small group discussions were very productive;
Very positive meeting - thought-provoking - hope project does achieve outcomes as this will be a major step forward (more space in meeting room would be great!);
Very useful in framing key outcomes issues facing other organisations & groups;
Really appreciated the wide cross section of group members, allowing me to hear a variety of perspectives.*

Some suggestions on the direction and content of future events were made:

*An opportunity to test thinking about our developing approaches.
Time to discuss issues raised today in more detail (e.g. tackling barriers).
More examples of organisations who are making progress with an outcomes approach.*

Direct feedback from organisations included in the research, particularly statutory sector organisations.

Aggregating data for planning & commissioning.

Conclusion

The Knowledge Exchange event provided a forum through which wider stakeholders were able to find out more about the Meaningful and Measurable project. The event was invaluable to the project in providing a forum for capture of data, building evidence that will feed into development of key themes within Meaningful and Measurable with input from organisations at different stages of implementation. The content and approach to this event reflected the fact that the project is at a very early stage: future events will provide more in-depth exploration, including input from more Project Partners.

The next Knowledge Exchange event ***“From Conversation to Recording to Practice”*** will be held on Wednesday 28th May 2014 at the University of Edinburgh. Focussing on the practice surrounding the recording of personal outcomes-focussed conversations, the event will include updates on learning within the Meaningful and Measurable Project and presentations from two Project Partners as well as wider stakeholder discussion on recording practice. As this work is a process, and discussions started at the February KE event will be developed further at the May event and further again at the September event, we very much hope that people who attended the February event will join us again in May, along with new participants.