

Report from Meaningful and Measurable Data Retreat One, 21st -22nd January 2014

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This report outlines the process and outputs of the Meaningful and Measurable data retreat, held at the University of Edinburgh in January 2014. This intensive two-day event provided space for collaborative discussion and development of plans for the Meaningful and Measurable project.

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

Background

There's always something very beneficial when you bring together people..... From partnerships from across Britain, including Wales. And our very different backgrounds. That... To throw into that mix the academic insight and the academic support makes a really, really, I think... Fruitful... A fruitful terrain for... For continuous improvement and for developing... (Quote from telephone conversation between Research Fellow and Project Partner).

Data retreats (held in January 2014, May 2014 and September 2014) are central to the activity within Meaningful and Measurable. These intensive two-day residential events provide a discursive space in which Project Partners and the academic team engage in a process of shared reflection, learning and planning. This report relates to the first data retreat, which took place at the University of Edinburgh on 21st -22nd January 2014. Altogether, 25 people including representatives from all eight Project Partners and the academic team and wider stakeholders gathered for two days of collaborative discussion, shared learning and interactive planning.

The aims of the data retreat were:

1. For each Project Partner to establish and discuss the baseline of approach and practice relating to personal outcomes approaches within their organisation
2. For Project Partners and the academic team to explore commonalities and differences across the eight Project Partners, and so clarify points for shared learning throughout the Meaningful and Measurable project
3. For Project Partners, with input from the academic team, to plan activity for the Action Research Projects, with a focus on phase one (February – May 2014)

4. For everyone at the retreat to participate in the development of the plan for evaluating and monitoring the impact of Meaningful and Measurable

This report summarises the discussions which took place as well as outlining plans for the first phase of the Action Research Projects. We use quotes from recorded telephone conversations between the Research Fellow on Meaningful and Measurable and the Project Partners to illustrate some of the different perspectives on the process.

Day one: 21st January 2014

There were two parts to the first day:

- I. Establishing a baseline through sharing reports and discussing commonalities and differences
- II. Moving towards project planning

Day one part one: establishing a baseline

I found it a really valuable exercise. I think it was really helpful to start, as you did, with a... An outline of the partner's projects and what... Where people were at with that. And it was brief enough to not get into too much detail from anyone, but enough to give a flavour of where... Where everyone was at.....So I found that really, really helpful. (Quote from telephone conversation between Research Fellow and Project Partner).

Prior to the data retreat, each Project Partner had produced a baseline summary, outlining the current situation within their organisation around the use of personal outcomes data, including: current focus, areas that were working well and barriers and challenges. The baseline summaries, which had been circulated to all partners and the academic team prior to the data retreat, also included partners' evaluations of the systems, practice and organisational culture surrounding personal outcomes within their organisation.

At the data retreat, each Project Partner was given ten minutes (followed by ten minutes' discussion) to present:

- What is working well (with specific examples)?
- What are the barriers and challenges (again, with specific examples)?
- Future plans, including thoughts on plans for the Action Research Phase one.

Presentation of Baseline Reports: summary

The eight Project Partners are at different stages in implementing a personal outcomes approach. Sharing and discussing their presentations confirmed that Meaningful and Measurable is not starting from scratch: there are existing systems, practices and cultures within Project Partner organisations through which collation and analysis of personal outcomes data is taking place with positive impact. Alongside this, accounts of the journeys presented by the Project Partners reiterated how long culture change can take: the ongoing importance of distinguishing between outputs and outcomes at all levels of organisations was apparent.

Cross-organisational learning

The process of sharing baseline summaries from all of the Project Partners confirmed the need for a whole systems approach, one in which people at all levels of organisations are engaged with the development and implementation of a personal outcomes approach. A common theme was the importance of recording and a lack of consistency in recording practice, even within pockets of the same organisation. The significance of the processes surrounding personal outcomes approaches and the value of conversations in themselves was also highlighted. The importance of modelling a personal outcomes approach was discussed in several contexts, for example taking a personal outcomes approach to conversations at all levels of organisations.

Learning to be carried forward into the Meaningful and Measurable Project

The significance of the timing of Meaningful and Measurable in the context of agendas around eligibility, commissioning and performance management was also highlighted through the exploration of commonalities and differences represented in the baseline reports. The presentations and discussion also highlighted the challenges that the Meaningful and Measurable project needs to address, for example the challenge of developing manageable approaches to analysis of qualitative data and the need to demonstrate the value of the clarity of purpose that can be achieved by a personal outcomes approach. The discussion also highlighted the role that Meaningful and Measurable could and should have in advancing personal outcomes approaches, for example presenting the shared learning around collation and use of data and the potential impact on recording practice if it could be explored within organisations and staff engaged in collation and use of data.

Day one part two: moving towards project planning

Contribution Analysis

The, sort of, logic modelling contributions analysis side of things was very interesting, very useful. I think there was a little bit of a challenge in terms of just looking at about how we embed that approach into... Into the work that we're actually doing. But that may well come later (Quote from telephone conversation between Research Fellow and Project Partner).

The approach taken to evaluating the immediate and lasting impact of Meaningful and Measurable is "Contribution Analysis". Contribution Analysis is based on a logic model approach and focusses on gathering evidence in order to monitor the impact of, in this, case, a collaborative knowledge exchange project. Contribution Analysis lends itself to a participatory approach to evaluating impact of a project in which multiple partners are engaged.

Contribution Analysis starts by identifying:

1. Resources: What resources will support the activities?
2. Activities and outputs: What activities and outputs will take place, what methods will be used?
3. Engagement and Reach: Who are the target stakeholders and how will they be engaged?
4. Reactions: How do the stakeholders react?
5. Knowledge, attitudes and skills: What knowledge/ attitudes/ skills will change as a result?
6. Practice and behaviour change: What practices/ behaviour do we expect to change?
7. Wider outcomes: what overall outcomes are desired for the project?

By exploring what needs to happen to get from each stage in the process to the next, and identifying the assumptions that are being made about each step alongside the potential risks of the process not being completed efficiently or to its full potential, a detailed plan for monitoring and evaluating projects emerges.

Whilst the Contribution Analysis for Meaningful and Measureable is being overseen by the academic team, it was important that Project Partners were involved in both identifying what their desired outcomes for the work would be and in identifying the assumptions being made and the potential risks. In order to do this, we were joined at this point in the retreat by Sarah Morton, from the Centre for Research on Families and Relationships at the University of Edinburgh, who explained the

process of Contribution Analysis and led an interactive session involving everyone who was at the retreat. Since then, a monitoring and evaluation plan for Meaningful and Measurable has been developed, and will be revisited at each data retreat.

Planning for Action Research Projects phase one

The final session on day one involved Project Partners working in smaller groups to write down any emerging thoughts about potential directions and plans for the first phase of the Action Research Projects. These plans were picked up again in much more detail during day two: this session at the end of day one was an opportunity for everyone to ensure that they had recorded any thoughts about the Action Research Projects that had emerged from the collaborative discussions on day one.

Day two: 22nd January 2014

Day two: planning for Action Research Phase one

I think the time spent working on our proposals was really helpful. Far more ambitious than I thought it was going to be. I didn't expect that we would be actually finishing off the... The two days by actually having worked up some rough proposals. (Quote from telephone conversation between Research Fellow and Project Partner).

Day two of the data retreat focussed on a discursive space in which each Project Partner developed a plan for the first phase of the Action Research. A structure for doing this was suggested:

- Establishing a **rationale** for the plan by identifying the gap in knowledge to be explored through the action research
- Developing **aims** for the project based on that rationale
- Developing **research questions** based on those aims
- Identifying the appropriate **methodology and methods**
- Establishing a **timeframe** for the work

Rationale, aims and research questions

Project Partners identified the following areas as needing more in-depth understanding and therefore the rationale for the Action Research Project plans:

- **Recording practice** surrounding personal outcomes:
 - What are practitioners recording?

- How does what is being recorded reflect the conversations that practitioners are having with people accessing services?
- How does recording practice reflect progress towards achieving personal outcomes?
- Does personal outcomes data represent positive outcomes for people accessing services?
- How accurate and consistent is qualitative data that is recorded alongside scores from quantitative measurement tools that some partners are already using?
- **The views and experiences of practitioners** who are engaged in outcomes focussed assessments, for example:
 - Their views on recording practice (as outlined above)
 - How they perceive personal outcomes data and how that influences service improvement
- **The conversations which take place** between practitioners and people accessing services when personal outcomes data is being recorded
- **The relationship** between personal outcomes approaches and **other service-related issues**:
 - Service Improvement
 - Service Planning
 - Performance Management

Project Partners then developed research questions on the basis of the gaps in knowledge identified above.

Methods

The methods that Project Partners are using in Action Research Phase One reflect the aspects of personal outcomes practice identified for exploration by each Practice Partner, and include:

- Extracting personal outcomes information from organisational systems and conducting an audit of documents, including:
 - Analysis of data by core Project Partners
 - Group approaches to developing a shared sense of the documents
 - Development of case-studies based on personal outcomes data within organisational systems
- Semi-structured interviews with practitioners in organisations about their practice surrounding personal outcomes information

- Two of the Project Partners established a collaborative approach, in which interviews within each organisation were conducted by the other organisation
- Discussions with practitioners around use of personal outcomes data
 - One partner is holding focus groups with practitioners, exploring approaches to personal outcomes practice and experiences of recording
- Observation of team meetings where personal outcomes approaches were being discussed
- One-to-one interviews with service users

Towards the end of day two, all Project Partners outlined their plans for Action Research Phase One and a gallery walk round took place, enabling further cross-learning and sharing of ideas to take place.

Implementing the plans

Following the data retreat, Project Partners have been working with their academic mentor to implement the work. This document outlines the plans in their format two weeks after the first data retreat, any adaptations that have been made as part of the action research process will be explored at the second data retreat (May 14th-15th 2014) and will be documented in the report from that data retreat.

Conclusion

It felt a real luxury to... To have two days out. And actually, you know, devote that amount of time to this particular process. But I think with... On reflection, I think that has been an important... An important part of the process. (Quote from telephone conversation between Research Fellow and Project Partner)

The data retreat provided space in which individual organisations were able to clarify their current position surrounding personal outcomes approaches, in particular use of information and data in the context of interaction with other health, social care and voluntary sector organisations who are at differing stages in implementing a personal outcomes approach. In this way, the data retreat was a process of shared learning between the Project Partner organisations. Added to this, the collaboration between the academic team and the Project Partners created space for the application of research methods to the situations within and between organisations. This resulted in a unique space for dialogue between academia and practice.