

# Personal outcomes

**Learning from the  
Meaningful and  
Measurable project:**  
Strengthening links  
between identity, action  
and decision-making

**Summary version**

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# Introduction

This is a summary of learning from Meaningful and Measurable, a collaborative action inquiry project involving seven multi-sectoral organisations in Scotland, and one local authority in Wales. A key concern was to ensure that personal outcomes data gathered through practice encounters should be of sufficient quality to be useable for decision-making, at individual and collective levels.

Funded by the Economic and Social Research Council (ESRC), the project also involved the Universities of Edinburgh, Strathclyde and Swansea. The project ran from November 2013 to February 2015 and set out to improve understanding about the difference made by focusing on outcomes in practice. The full report is available online ([ihub.scot](http://ihub.scot)) and builds on a series of other outputs, which are referenced in that version.

The project was a further stage in the journey of embedding personal outcomes, which increased understanding on several themes.

# Where we were before Meaningful and Measurable: a very brief review

- » Work on embedding personal outcomes in practice began in 2006-2007.
- » The Exchange Model of Assessment has provided a powerful motif in representing the importance of negotiating different perspectives, with emphasis on including the perspective of the person using services, in agreeing outcomes and associated actions.
- » The culture change involved includes the practitioner choosing who to be with the person, an expert or an enabler, recognising that it is sometimes necessary to move between roles but that this should be a conscious choice, rather than assuming the default position of expert.
- » Although there was tentative evidence about the benefits of outcomes focused conversations, more robust data were required.
- » Although policy increasingly emphasises personal outcomes, constraints in the system need to be addressed, and include informational demands including commissioning, performance management and prioritisation, and the aspiration was to progress these elements.
- » The project provided opportunities to test assumptions thus far.

**Figure 1:** Smale and Tuson's exchange model (adapted)



# Meaningful and Measurable

- » Eight practice partners participated in this collaborative action inquiry project.
- » The project aimed to explore different approaches to capture and use of personal outcomes data, exploring long-standing tensions in the process.
- » While each project partner had its own aims, common themes were exploration of recording, testing out different types of information use, and working with practitioners to improve services.
- » The collaborative aspects of the project were supported by data retreats involving practice partners and academic mentors, and knowledge exchange events with a wider range of stakeholders.

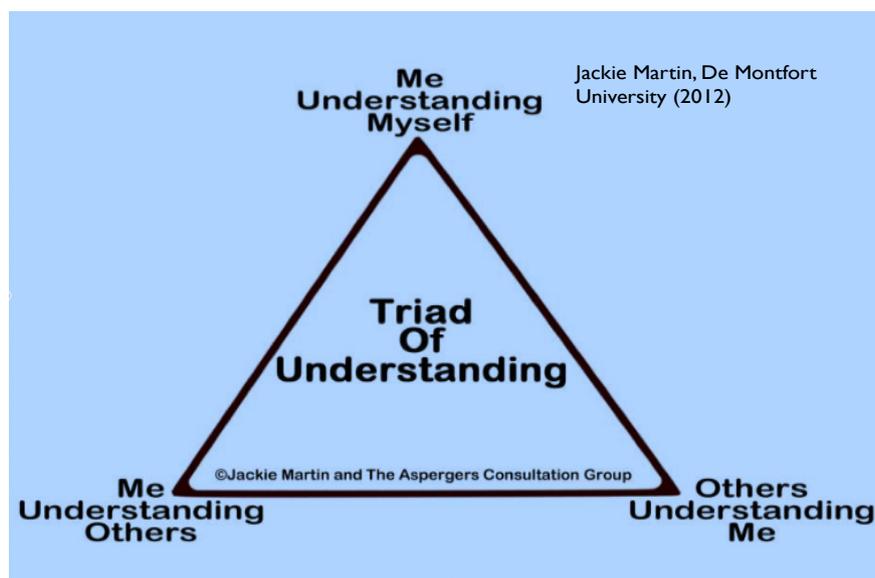
# Shifting the balance from analysis and use of data to recording and data quality

- » An early finding of the project was that recorded narrative data about outcomes was of poorer quality than expected, was stored in diverse locations, and often outside of formal documentation, in case notes.
- » It was acknowledged that practitioners were facing diverse and competing demands in their recording practice.
- » There has also been growing recognition that people using services need time, space and a supportive relationship to recover, reflect on their lives and to identify what their priorities are, and achieve understanding. This quality of interaction is also required to generate personalised outcomes information of sufficient quality to inform decision-making.
- » There is also a long-standing concern to ensure that people with diverse ways of communicating are not excluded from a personal outcomes approach, with awareness of the need to include different sources of information to understand what these outcomes are, including non-verbal communication, and this should be recorded too.

# The importance of the conversation

- » The project produced detailed evidence of the role of the conversation within the context of relationship building, as a key contribution and an effective intervention in its own right.
- » Evidence of the benefits to the person include the therapeutic advantages of good conversations, individual involvement in decision-making, greater clarity of purpose and more enabling practice.
- » In parallel to the conversations having to change at the frontline, there was evidence about the need to change the conversation in the organisation as a whole, and to ensure that practitioners were effectively supported to focus on outcomes.
- » Factors which promote the focus on personal outcomes at organisational level include sharing good practice examples and storytelling, changing the conversation at every level, supporting practitioners so that they feel valued and listened to, and a feedback loop to practitioners about how outcomes information is used.
- » There is a potential lost opportunity when outcomes are considered primarily as something to be measured and counted, rather than a chance to develop a shared understanding of the person's life and priorities.

**Figure 4: The Triad of Understanding (Jackie Martin et al 2012)**



# The importance of narrative recording - confirming principles and new findings

- » Detailed attention to the role of recording started with considering the importance of narrative recording in general, to the recording of personal outcomes in support planning, and then to recording personal outcomes at review, with distinct benefits evident at each stage.
- » Five criteria were agreed as indicators of good personal outcomes recording:
  - » a clear distinction between outcomes and outputs,
  - » the outcome should be personalised
  - » the person/family should have a role
  - » the person's own language should be used as appropriate (including non-verbal communication), and
  - » the plan should be action oriented.
- » The carer case study has been written as a journal article, focusing on the role of recorded narrative in supporting carer, practitioner and organisational memory, and in supporting relationship building.
- » Practitioners identified their wish to find a balance between recording in a concise way so that the information is manageable and retrievable amongst large numbers of records, and ensuring that meaning is not lost.
- » A range of conflicting pressures were identified on narrative recording, with some distinctions noted between statutory and voluntary sectors.

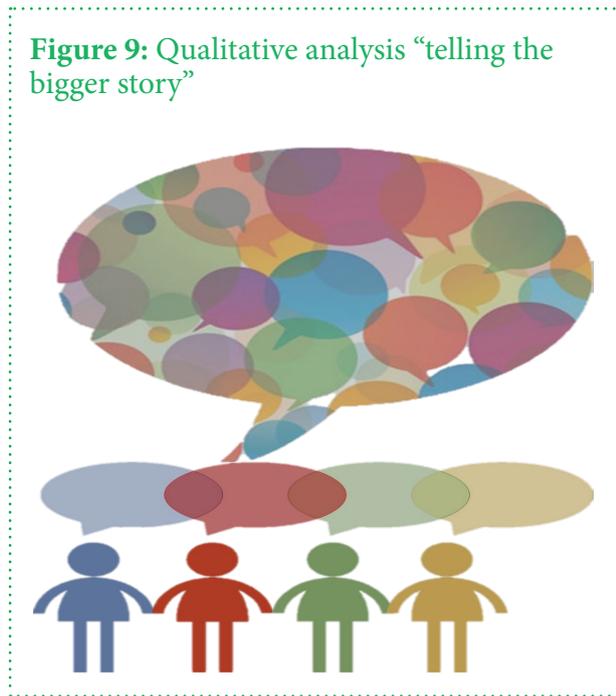
# Using outcomes measures: with caveats and not in isolation

- » Although the topic of measurement was raised less frequently in discussion than the importance of conversations and narrative recording, it was the greatest source of debate in the project.
- » Some of the measurement conundrums had been discussed before the project started, including the need to shift from attribution to contribution when considering outcomes and the risks of over investing in the development of a one size fits all tool. The project enabled more in depth discussion of these dilemmas, bringing new insights to bear.
- » A new area of exploration was differences in how outcomes were conceptualised and operationalised across partners, and a common view was that different approaches to measurement should be tailored to different populations or conditions.
- » There was discussion around the validity of the data generated by all of the approaches. Mismatches between quantitative and qualitative recording reinforced the importance of viewing percentage outcomes in the context of other data. A key concern was that percentage outcomes scores can give an artificial sense of accuracy and mask important differences.
- » Partner concerns about mapping of outcomes (onto a framework of outcomes) were prompted by a concern to ensure that mapping did not misrepresent the conversations held. There was agreement that aggregated outcomes, whether recorded initially as personal outcomes within or subsequently mapped to pre-defined categories, can be grouped into a relatively small number of reasonably universal goals.
- » There was consensus that each current approach should be used with caveats and not in isolation [from other sources of information, including qualitative data].
- » Overall, there was agreement that measurement should be viewed as an adjunct to meaning rather than a driver shaping interactions.

# The place and case for qualitative data analysis

- » Knowledge about robust approaches to analysis of qualitative data in service settings is limited.
- » Many people hear qualitative data and think about including a story.
- » Between story and statistics – there is a middle ground.
- » Assumptions about sampling are based on quantitative methods and if put into practice, would be unmanageable.
- » Information/performance managers who engaged with qualitative data for the first time reported profound effects on understanding.

**Figure 9:** Qualitative analysis “telling the bigger story”



# Concerns about predominant approaches to performance management

- » Predominant approaches to performance management emerged as a key concern in the first data retreat and knowledge exchange event, and formed the basis for 10 follow-up interviews with practice partners by academic mentors.
- » Amongst a range of barriers and threats to effective data use, concerns about performance management were most frequently identified.
- » These concerns centred on top-down, statistically driven approaches which were seen as reductive and generating negative emotions amongst practitioners.
- » At one knowledge exchange event, the use of effective personal outcomes data was described by participants as meaningful, understandable, promoting understanding and linked to qualitative data.
- » Qualitative data and analysis were identified as important, although acknowledged as difficult to do.

# Use of outcomes information

- » Concerns about the onerous demands of predominant approaches to performance management, and their distorting effects, were raised both by practice partners and the wider group of stakeholders, and influenced the direction of the project at an early stage.
- » Further concerns were raised by audit of recorded outcomes across practice partners and resulted in an early shift in the priorities identified with regard to their use of information.
- » The main areas of focus became practice improvement and service development, which meant creating a feedback loop for use of information within the organisation, rather than solely reporting information outwards for performance purposes.
- » While the original intentions were not all addressed as expected, there was rich learning about the possibilities of using personal outcomes data.
- » Through collaborative methods, organisations developed distinctive yet consistent approaches, which led to immediate improvements, while also providing data of an improved quality for reporting externally, without eclipsing the good conversations.

# Conclusion

What is described here is significant culture change, which is known to require sustained focus. The main focus of this project was the backstage work going on in organisations, and how this can hinder or support a focus on what matters to people, in generating information for decision-making. While perspectives of people using services and carers were included, direct public participation needs to be strengthened in the next stages of this work. As personal outcomes are increasingly recognised for the contribution they can make to strengthening links between identity, action and decision-making across agencies, supporting more enabling and relationship based practice, it is critical that collaboration continues between research, policy and practice to sustain and improve on the gains made, and the hope is that this resource can help to inform the next steps.



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