

# Meaningful & Measurable

A Collaborative Action Research Project

Developing Approaches to the Analysis & Use of Personal Outcomes Data

## FINAL PROJECT PARTNER REPORT

BRIDGEND COUNTY BOROUGH  
COUNCIL

*February 2013*



# About this Report

**Meaningful and Measurable** is a Collaborative Action Research project funded by the Economic and Social Research Council (ESRC). The project builds on an existing programme of work over several years in Scotland, involving all of the organisations to varying extents, in developing and embedding an outcomes approach to practice. The project itself was prompted because developing approaches to the recording, analysis and use of personal outcomes data has been found to pose challenges at all levels of organisations. Within this project, we are exploring the tension between:

- **Meaning:** the need for detailed, contextualised information on individual experience to inform individual planning and service improvement.
- **Measurement:** the need to aggregate information on personal outcomes to inform decision making at organisational and national levels.

All eight project partners have contributed to the findings of the project overall which will be reported separately.

Six project partners have also authored reports on their local projects.

This report shares the learning of Bridgend County Borough Council.

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## PROJECT PARTNERS

Angus Council  
Bridgend County Borough Council  
East Renfrewshire CHCP  
Edinburgh City Council  
Moray HSCP  
Penumbra  
Stirling Council  
VOCAL

## ACADEMIC PARTNERS

University of Edinburgh  
University of Strathclyde  
University of Swansea

## STAKEHOLDER PARTNERS

Joint Improvement Team  
Community Care Benchmarking Network  
Health & Social Care Alliance  
Social Services Improvement Agency Wales

# Bridgend Project Report



## 1. Beyond the Emperor's New Clothes

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**Beyond the emperor's new clothes:** Engaging meaningfully with the capture and use of personal outcomes information, with a focus on improving not proving, through a collaborative and appreciative action learning approach.

### Challenges:

- Impact of budget cuts and eligibility criteria
- Pace of work and context of crisis intervention
- Change fatigue amongst frontline practitioners
- Skepticism, particularly regarding work with older people
- Flow of outcomes information across a fragmented system
- Conflicting conceptualisation of outcomes between different professions
- Overly bureaucratic organisational processes
- A degree of risk aversion
- Limited dialogue between frontline teams and senior managers, affected by integration agenda

### Benefits:

- Building on and supporting the intrinsic desire of most practitioners and service providers to make a positive difference to the lives of others
- Supporting the development of relationship centred practice and meaningful conversations
- Stronger links between frontline practitioners and service and workforce development staff
- Greater ownership of the personal outcomes approach within teams
- Improvements in case recording and individual/group supervision
- A growing recognition of the importance of 'little things' in the achievement of personal outcomes, especially for older people with high support needs

## 2. Where We Were

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Before the project started Bridgend County Borough Council had worked with colleagues from the Social Policy Research Unit, University of York to explore outcome focussed practice. Further work was completed with teams to develop the practice tools (i.e. the outcomes framework within assessment and care management documentation). Further intensive development sessions with all teams and managers were commissioned and delivered by an organisation called Self Direct.



However, there were concerns that practice and recording was not changing for various reasons, which we wanted to explore further through the Meaningful and Measureable project. The project work was focussed on work with older people and adults with physical and sensory disability.

## 3. What We Started Out To Do

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### Aims

- Phase 1 (Feb to May 2014) - to explore how we currently record and evidence an outcome focused approach to practice, with a view to identifying improvement opportunities and people's roles in taking the necessary change and development forward
- Phase 2 (June to September 2014) - to identify and agree what development and change is needed to influence and support decision making and have better information which can inform practice development, commissioning and performance management

### Research questions

#### Phase 1:

- *Why* do we currently record personal outcomes?
- *How* do we currently record personal outcomes?
- *What* do we currently record in terms of personal outcomes?
- *Where* do we currently record this?
- What needs to change in each of the above to achieve clarity and consistency in recording so that it's defined by the person not the professional, individualised, not generalised and an outcome not an output?

#### Phase 2:

- How can we use the above information from phase 1 to inform practice development, commissioning and performance management and both inform and develop our understanding as to how personal outcomes for individuals' can be achieved and evidenced?

### Methods

#### Phase 1:

- Initial personal outcomes workshop with Senior Managers, Assistant Team Managers and Senior Practitioners (with Emma Miller)



- Three focus groups made up of seven Assistant Team Managers and Senior Practitioners to explore their approach to personal outcome focused practice and their experiences of recording
- Sample audit of case files from each of the teams represented
- Export and analysis of current relevant IT data

#### Phase 2:

- Three more focus groups exploring how to improve personal outcome focused practice and recording based upon findings of phase 1
- Practitioner and service user training on making and using digital stories
- Making of two digital stories - one service user, one social worker
- Strengthening links between project work and departmental training programme in relation to Social Services and Well-being (Wales) Act

To begin dialogue with Commissioning and Performance Managers regarding the implications of project work on commissioning and performance management

## 4. What We Actually Did

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The project went broadly to plan and the vast majority of planned activities took place (see above), although pressures on the Commissioning Manager and complex IT issues regarding performance data meant that project work focused on use of personal outcomes information in individual practice and team development. The export and analysis of IT data in phase one could not be taken beyond initial exploration following the discovery that the data was either not recorded, inconsistent or when recorded it was in a range of different places making systematic capture not possible.

In addition, project participants were involved in a Departmental work stream to inform and redesign the assessment, care and support plan and review record in line with the Social Services and Well-being (Wales) Act 2014, which has a strong focus on the promotion of well-being and associated outcomes.

The six workshops also supported the opportunity to learn from practice within the authority and beyond. They also facilitated sharing of associated research and provided a safe learning environment which enabled questioning and challenge of current practice and recording.

The making of the digital story resulted from an invite by the individual's new social worker to 'tell me about you'. What she received in response was an incredibly powerful story which highlighted the person's strengths, abilities and vulnerabilities. This was at odds with the passive but angry service recipient known to the Authority. This story enabled the social worker to work in a person centred way, concentrating on the strengths identified. The breakthrough that this made prompted both the person and practitioner to record this through a digital story. This has, with permission, been shared at a number of learning events, and the individual herself is keen to support others to use this form of communication



## 5. Findings

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We have discovered the following:

### 1. Local level

#### Recording

- Recording on existing domain based assessments focused on problems and what needs to happen. This often resulted in a focus on outputs or service interventions, not outcomes. This did not give us any meaningful outcome information.
- Assessments with older people are often completed at an initial visit which is a time of crisis and carer stress, which limits conversational and co-produced personal outcomes beyond immediate 'fixing'
- Assessments identify level of risk, eligibility and how this can be managed by service provision. When reviewed, outcomes were not recorded.
- Separate case file notes (multi-disciplinary) tend to reflect more the dynamics and conversations and were a richer source of personal outcomes information

#### Practice

- Staff are energised and enthused by the concept of making a positive difference to the lives of others and the *personal* outcomes approach
- Resource and capacity issues and associated stress can lead to 'passing the buck' (i.e. responsibility) between individuals and teams which is unhelpful
- The *personal* outcomes approach and use of personal outcomes information will only work if everyone in the system is signed up to the same understanding - including health colleagues. A shared understanding of personal outcomes is key
- Frontline staff (a mix of qualified and unqualified) need significant support and encouragement to think more creatively and learn from mistakes (coaching/mentoring)
- A focus on meeting eligibility requirements can discourage a strengths based approach to assessment
- Good recording does not always equate to good practice - some practitioners can write the 'right things', but this is not always reflected in their practice and vice-versa. Capturing the quality of practitioner working relationships with service users and carers is difficult but important
- Conversations and assessment at a time of crisis don't generate good information on what matters to a person around their longer term wellbeing
- Staff are increasingly positive about the new recording tools, although confidence and consistency in recording personal outcomes is still very mixed
- There are still issues around where things should be recorded as there is more free text now



- The making and hearing of stories captures the imagination and facilitates a shift in thinking towards a personal outcomes approach - staff warmed to this much more than the analysis of quantitative data
- Getting service users to tell and record their own stories can be very empowering for them and they can be an excellent resource to support cultural change
- Assistant Team Managers and Senior Practitioners have found some of the resources and approaches shared and used in the workshops helpful in opening up the conversation with teams - frontline staff are now identifying the issues themselves, rather than being told

## Systemic issues

- Well-meaning intentions and directives from senior managers are no substitute for meaningful dialogue, although it is acknowledged this is not easy in a very busy working environment
- A *personal* outcomes approach for service users must be mirrored in the way frontline staff feel valued and supported
- The fragmentation of contact, assessment, support planning, service brokerage and review teams acts as a barrier to the flow and use of *personal* outcomes information
- Some staff are experiencing change fatigue, which needs to be recognised and addressed.
- Staff feel that there are bureaucratic processes that add stress, rather than value to practice (e.g. meeting targets for staff appraisals, rather than nurturing relational support within teams and a plethora of different forms required by admin and finance)
- The Welsh Government savings agenda present a danger of focusing on *change* outcomes related to physical functioning/independence (...and minimised care and support), rather than *personal* outcomes, which are much broader and deeper. Well-being is a subjective measure. Older people highly value *process* outcomes (e.g. being listened to and having continuity of carer or social worker) and *maintenance* outcomes (e.g. keeping in contact with friends, making a contribution)
- Changing recording templates always creates a mix of positive and negative responses

## 2. M&M data retreats and associated learning

- Each project site is exploring different aspects of the capture and use of personal outcomes data and they are discovering that simplistic approaches do **not** work. The project work is discovering unanticipated complexities
- There are many common themes and issues emerging from project partners, which are paradoxically encouraging and discouraging at the same time
- Sharing stories and experiences with other project partners has been deeply encouraging and has given us ideas, resources and resolve that we have taken back to Wales



- The significance of the integration agenda for all partners has been identified and yet there is still much to be done i.e. sharing a common understanding and approach to practice which supports personal outcomes
- They have provided a safe and effective sounding board for the sharing of our experiences and frustrations, which has helped to clarify some of the issues
- Having academic colleagues who can help draw out some of the themes and issues has been helpful

## 6. What Difference Is This Making?

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We now have:

- A revised assessment, care & support planning and review framework
- Early stage development of IT portals to support integrated recording
- A clearer understanding of existing recording of personal outcomes within different parts of the system and where there is need for improvement
- A greater appreciation of the power of stories to support reflective practice development and the motivation of both practitioners and service users
- Experience in the making of digital stories for use in workforce development
- A more appreciative and collaborative approach to workforce development, with less emphasis on 'top-down' training - project participant and service user now involved in design and delivery of workshops on the new assessment framework and associated cultural change
- A less naïve understanding of metrics... but still a long way to go!
- A better understanding and stronger focus on quality of life and process outcomes (interdependence), rather than just functional 're-ablement' outcomes (independence)

## 7. Personal Accounts

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The following are examples shared with us by practitioners who felt that they had made their engagement meaningful and were able to evidence/measure what was wanted and what was achieved.

**Quotes taken from digital stories:** '*Just Listen*' recorded by an individual and social work practitioner which illustrate how an approach which incorporates supporting choice and control through reflective practice and engagement can result in meaningful practice and identifiable outcomes.

**Individual perception prior to social work engagement:** "*I felt lost, invisible stuck. My marriage was falling apart, I didn't let anyone in. I was told I would always be in a chair*". [Passive recipient of care]





**Practitioner in conversation with individual:** *“I have hopes, dreams and aspirations, what are your hopes and dreams for the future?”*

**Individual:** *“No-one has ever asked me that. I have ambitions and dreams. I trusted her (the practitioner) and let her in. Realised it wasn’t the chair it was me”*

### “The future is looking bright”

Practitioner working with mother with physical disabilities:

**Outcomes wanted** (in person’s words): *“Help to get back on track. Want my energy and life back, problems are adding to depression” “To find peace and happiness and to stop being miserable in every core of me.” “Someone to talk to about feelings of sadness and loss.”*

**Outcomes achieved:** *Improved daily life and sense of wellbeing. Stronger parental role and improved relationship with son. Better self-management of personal health and home.*

This has increased her ability to manage day-to-day life which feels a lot better.

### Overall outcome “being back in control of my life”

See associated digital stories and personal stories shared through the data retreats. These have been used at a local level as part of the training programmes and with political members in Bridgend which are being delivered to support the implementation of the Social Services and Wellbeing (Wales) Act 2014. This Act seeks to transform the way social services are delivered, promoting people’s independence and to give them a stronger voice and control. They have also been used in the national learning events held with local politicians and senior managers as part of the development of the national outcomes framework in Wales.

## 8. Challenges and Opportunities

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### Negative external factors:

- Massive and unprecedented cuts in budgets as a result of austerity, have dominated thinking and the focus of work within the Local Authority. Bridgend has also had to undertake significant work on decommissioning our predominantly in house service provision. The reduction in development posts and concentration on newly developed localised arrangements (3 unitary health and social services region - Western Bay) has required significant work and limited both engagement and impact at a local level.



## Positive external opportunities:

- Whilst the project was running, links were established with the National Outcomes Framework Technical Group and the development of a pilot to develop a way of measuring outcomes for the Welsh National Outcomes Framework. Bridgend made a successful bid to become a pilot authority to take forward the work and link in the findings of the Meaningful and Measurable project. This includes working membership of a national group facilitated by the Social Services Improvement Agency and reporting to Welsh Government. The group is made up of representatives from the Welsh Government, Welsh Local Government Association, Care and Social Services Inspectorate Wales, Welsh Data Unit, Health (Information and Technology) and seven Welsh local authorities.
- Whilst the initial focus of the pilot project was around simplistic approaches to aggregating data on a national basis, we were able to share the findings of the M&M project and in partnership with colleagues in Monmouthshire County Council, were able to influence the focus of the pilot, to look more deeply and place more focus on the importance of meaningful conversations at the frontline rather than the top-down imposed 'tick boxes'. As a result a three day Collaborative Communications training programme was included in the pilot work.
- As a pilot Authority Bridgend will be able to use its learning from this work, to move away from care management to working with people in a way which better supports them to identify what matters to them and explore their strengths and knowledge to inform what needs to happen to maximise their sense of wellbeing and ability to cope and best manage day to day life.
- The resources that this work has offered so far include:
  - awareness raising sessions with senior officers, members and workforce development managers
  - the identification of an integrated multi-disciplinary community network team to test out new approaches and ways of recording outcomes for people they work with
  - time and development opportunities including external bespoke training and resources to support cultural change. So far this has enabled the team and support officers (myself and training officer) to have 3 days out with an external facilitator to look at Collaborative Communication skills through exploring barriers to engagement, internal motivation and deepen reflective listening skills, practice the strategic use of key questions, and explore the importance of self-efficacy
- This work supported by coaching will be ongoing for the year, with the Welsh Government to receive feedback from the learning and look at next stages in terms of measuring and reporting on how we work with people to support their wellbeing in line with the Social Services and Wellbeing (Wales) Act 2014.
- The last meeting of the Bridgend Meaningful and Measurable Practitioner Group is in February with invitations extended to Team Managers. This will provide an opportunity to share the key findings and link to the outcomes pilot work. We hope to bring the two together for operational managers to maximise the opportunity to make informed next steps on being able to change existing culture to support more meaningful practice which we can evidence.



## 9. Implications and Learning

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### What did not work well and why:

- Engagement with commissioning processes - did not happen because we identified through the audit that we were not collecting data that could be aggregated for commissioning purposes. Looking at new ways of recording and how that can be reported will be developed in line with the work on the Welsh National Outcomes Framework programme. We hope that the learning from the Meaningful and Measurable project work will influence this over the coming months
- Developments in aggregation of IT data - huge systemic issues including the fact that the existing IT system is not fit for purpose and the Department has bought into a consortium contract with other Local Authorities which it cannot get out of easily

### What worked well and why:

- Appreciative approach to facilitation of focus groups - validation of practitioners knowledge and experiences, which resulted in 'buy-in' to project work
- Audit of existing recording - provided clear evidence of practice and systemic issues, and provided a realistic baseline for improvement work, and dismissed 'wishful thinking'
- Project work around making and using digital stories - captured people's imagination and enhanced motivation and learning
- More collaborative approach to workforce development within the Department as a result of improved dialogue - staff feel more engaged and motivated and contribute to learning events
- Development of case recording and individual/group supervision/mentoring within teams - enhanced understanding of personal outcomes approach amongst project participants, enabled them to better support and supervise/mentor practitioners within their teams
- Opportunity to influence the approach to the National Outcomes Framework pilot work in Wales



