Using information about personal outcomes: the critical link to practice

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Potted history

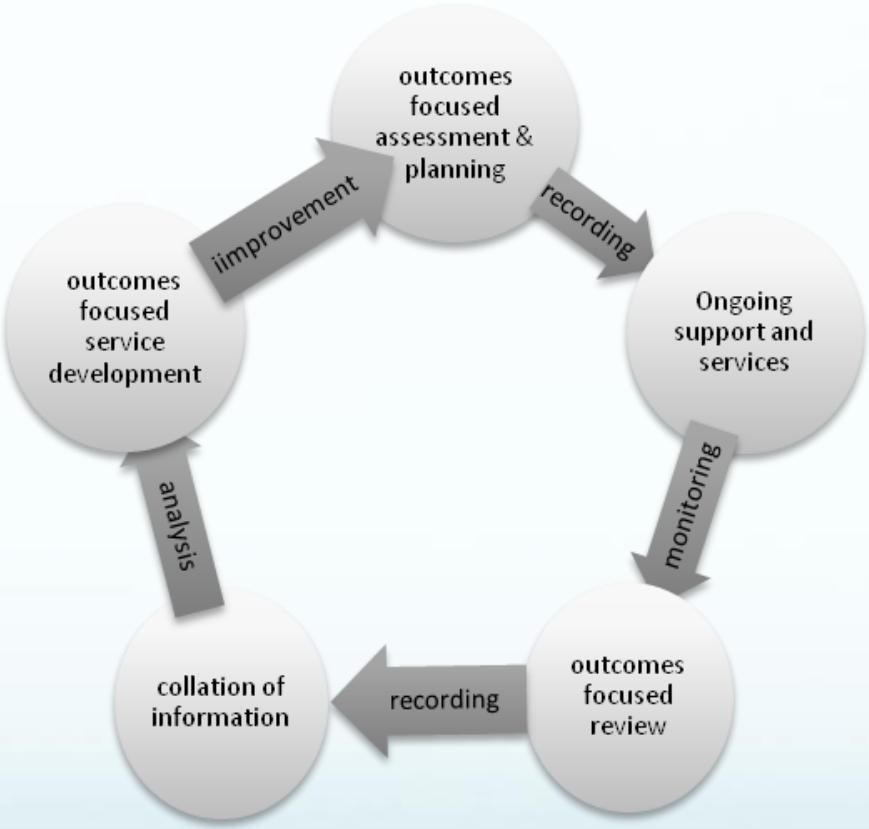
- Research at York University (SPRU) 1996 – 2006
- Research at Glasgow University 2004-2006

Outcomes of partnership working

- Work with JIT, partnerships and researchers from 2006, also with Wales
- Increasing involvement across sectors and with diverse national bodies
- Increasing emphasis in policy from 2010 – SDS, Carers, Dementia, etc
- **Meaningful and Measurable** 2013-15 (15 months) (8 practice partners, 3 universities, national bodies Scotland and Wales)

Original intention to focus on use of info, but had to take a big step back and look at recording first

Engagement, recording and use of information (TP guide, 2012)



Since this guide was written, the MM project has enhanced understanding of the links between conversation, the role of recorded narrative and qualitative data

Existing evidence patchy = 4 key benefits of a POA (focus on conversations)

- Improved public involvement in individual and organisational decision-making (Qureshi and Nicholas 2001)
- Clarity of purpose, with decisions less likely to be made on the basis of assumptions (Johnstone and Miller 2008, Thompson 2009)
- Improved agency associated with strengths based practice (referenced but not evidenced by Slasberg 2009)
- Therapeutic benefits from a conversational, assets based approach, which can already achieve outcomes (Petch 2012, Barrie 2012)

Also discussed in further detail in Cook and Miller (2012)

Needed a stronger evidence base = Meaningful and Measurable allowed us to further test out some of these claims about the conversation in its own right, whilst paying more attention to the place of recorded narrative and links to use of information

MM: learning about conversation

- Much is already known about the role of dialogics in contributing to socially just practice
- We examined the specific contribution of a POA
- Need to leave **assumptions** behind and consider the person in the context of horizons of past, present and future (Gadamer 1979)
- Focus on recognition as a vital human need (Taylor1994) which includes recognising capable agency (Ricoeur 2007)
- Critically requires the conversations take place at different tiers in the system, supported by management practice and policy

Recognition – agency

- *It's a collaborative thing. It's not just for staff to do to a service user… You need to engage the person with it. So you're like what… What can you do? What can I do? Sort of thing. And what can we both do?* (Penumbra interview)

- *When we look at some of the... the data that has been gathered, almost... Oh, I don't know. Almost always it's the child or the parent themselves who are saying, "Well, I need to do this to achieve this outcome." And it's not, "Oh well, the worker will have to go and do this" or "this agency will have to get that…" And I think that's what has been part of the... the culture change* (Angus, data retreat)

Nested networks – conversations throughout the system

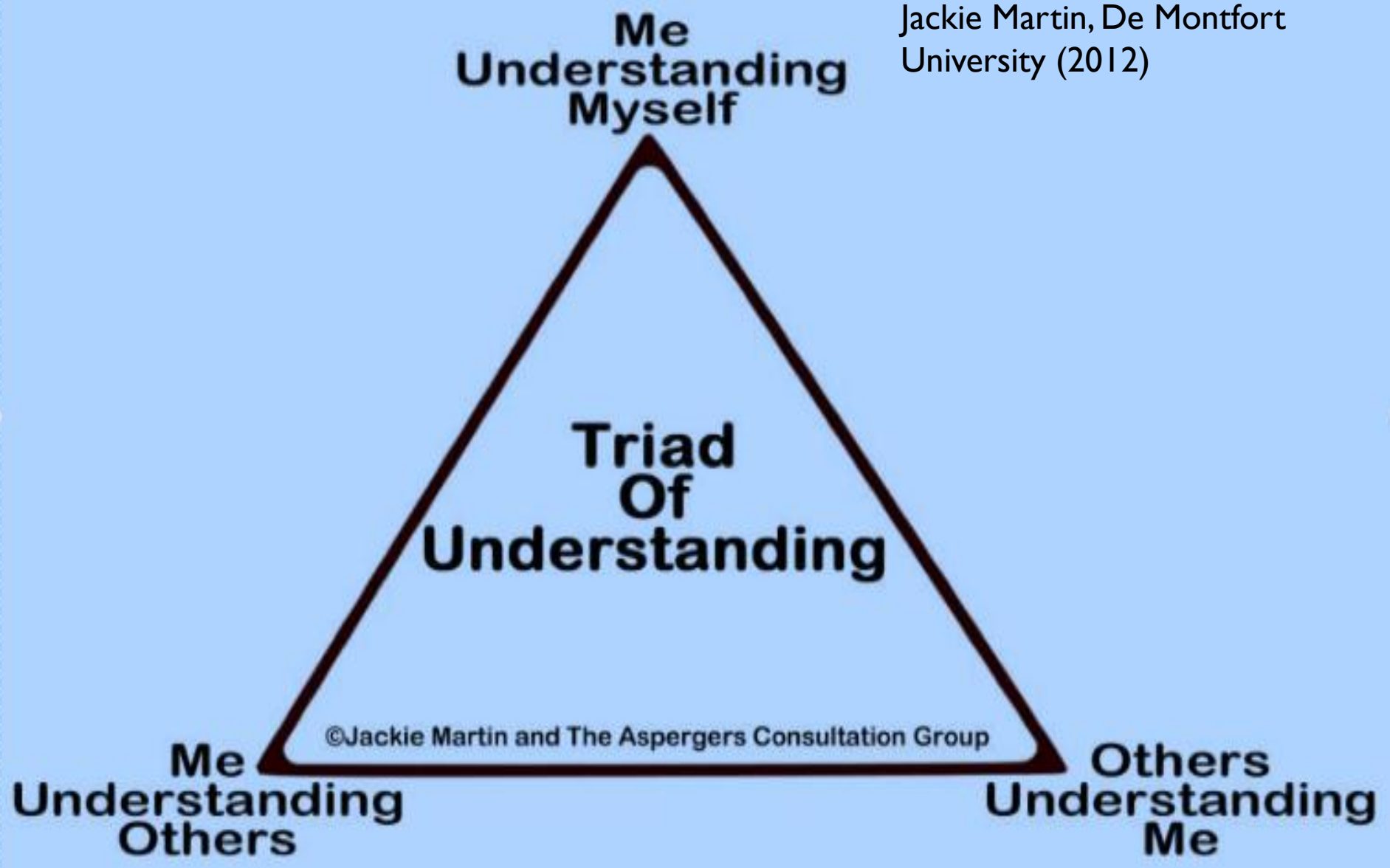
- *But it needs to be part of the day job. It needs to be not you go on a training course and learn and go back… So I need to try and get that culture where this is discussed in team meetings as it's part of day-to-day stuff* (Bridgend DR2)

- *The reablement manager reported that while she had seen significant improvements in the detail recorded in case notes she was still working closely with support staff through team meetings and supervision to ensure a consistent approach to outcomes focused conversations and recording* (Stirling final report)

Nested networks – conversations throughout the system

- *One of the things that we, kind of, came out of the discussions was how mutually dependent good outcomes-focused practice is. In that the individual and the workers and the families and practitioners and groups of practitioners and... people who are working with information systems, commissioners, the government, the whole system is dependent on everybody working together…I thought that notion of mutual dependency was really helpful for understanding the system* (Group one, KE)

Jackie Martin, De Montfort University (2012)



MM: learning about recording

- Narrative identity theory: people form their identity by integrating life experiences into an internalized, evolving story of the self, providing them with a sense of unity and purpose in life (McAdams 2001).
- Research on chronic illness narratives has shown how ‘biographical disruption’ caused by illness lead to a re-examination and reclaiming of the individual’s life (Bury 2001)
- What is required is a balanced account, which supports individual agency, without downplaying the stressful and disempowering environments that many people experience (Fisher 2008).
- Emphasis in the carer organisation case study on the role of narrative in supporting carer, practitioner and organisational memory

MM: learning about recording

- We are narrative beings, the relation between narrative and life is cyclical and narrative links to action (Ricoeur 1991)
- Concerned with narrative in the context of relationships in services
- In parallel with the shift from Q and A assessment to conversation, is the shift from tick box to narrative
- Retaining a narrative thread within the record has been critical not only to reflect the conversation and ensure that it is ‘personal’, but also influences the conversation on which the record is based
- Various pressures - value demands, functional demands and accountability demands (O’Rourke 2010) were evident in the audit of records undertaken by practice partners

Achieving a balance

'And I know it's a balance between recording in way that's kind of clear and concise, but also meaningful isn't it, which is a whole skill in itself…'

'And the conversation is the crucial thing. It's about how you record it. You know, and it's the difference between having a conversation and going and recording it, as opposed to having a record…or a way of recording, which is then imposed on the conversation.'

Elevating the status of recording

'So that it's not seen as a bureaucratic process…but actually seen as a core part of your support to the individual. And, you know, as part of the reflection on 'What have I understood? What am I taking from this? And what..? What have I heard?' So that's, I think, our starting point for staff. Is saying, you know, this is about practice development and it's about improving the support that we offer..'

5 criteria for recording

- Focus on outcomes not just outputs
- The outcomes should be personalized
- The person's voice should be included where possible (including non-verbal communication)
- There should be a role for the person
- The plan should be action-oriented

These criteria were agreed across practice partners. Draft journal article based on VOCAL as a case study

(Miller and Barrie 2015).

Use of information: The role of qualitative data

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

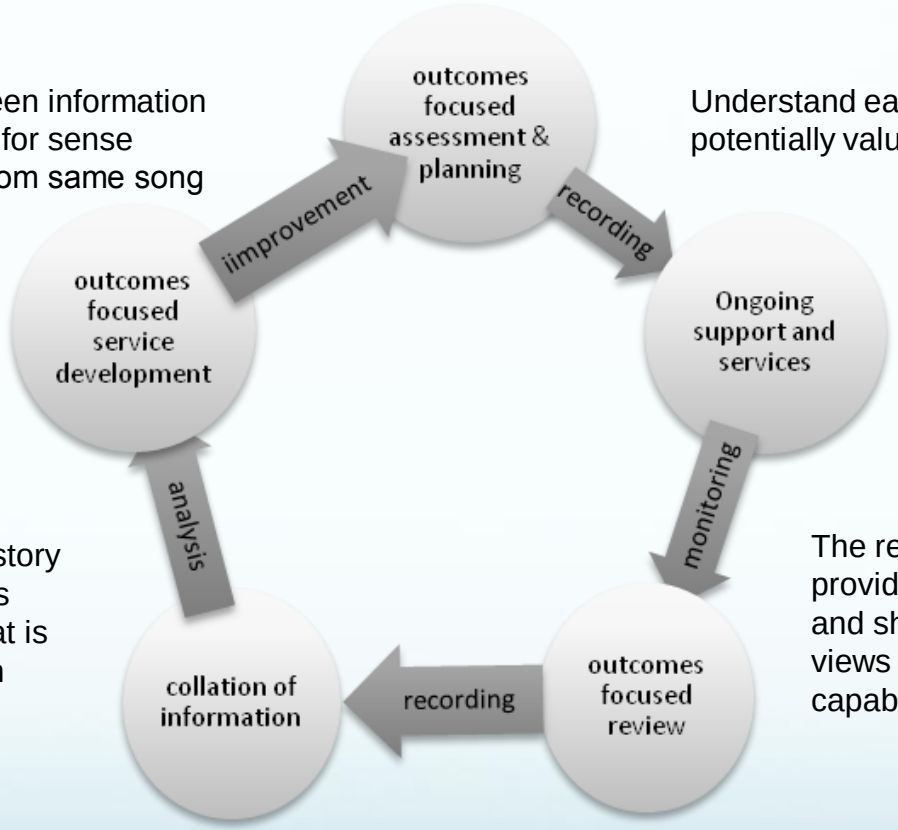
Use of information

- Concern about onerous demands of predominant approaches to performance management, not least the resource implications, and the distorting effects
- Evidence about conversations and recording demonstrate the value of responsive and relational approaches, as does other research (Patterson et al 2010)
- Despite the initial intention to focus on use of info, early audits showed the quality of recording was not as anticipated (quant and qual)
- Led to focus on practice = recording as a reflection of conversation and as a valuable component in its own right
- The main use of info became to improve that practice – to feed the info back in
- 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, yet not eclipsing the good conversations

Journal article in outline form at present

Engagement, recording and use of information (revisited, 2016)

Feedback loops between information and practice essential for sense making and 'singing from same song sheet'



Understand each conversation as a potentially valuable intervention

Analysis of multiple narratives (between story and statistics) shapes understanding of what is going on in any given context

The recorded narrative provides the link to action and shapes how everyone views the person and their capabilities over time