



# Measuring Softer Outcomes in Advice Services

# Introduction

The Common Advice Performance Management Framework (CAPMF) aims to capture key performance indicators for money and welfare rights advice services funded by local authorities, on both an in-house and commissioned basis and has been developed in close consultation and co-operation with local authorities and other key stakeholders. It provides a consistent basis for reporting and measuring money and welfare rights advice performance.

With increasing uncertainty in relation to the future funding of money and welfare rights advice services in the face of ongoing budget cuts, as evidenced in previous iterations of the framework, the need to demonstrate the impact of the services remains key.

For the first time, during the 2017/18 iteration of the CAPMF, local authorities were asked to include measures for the softer outcomes experienced by advice service users as part of the data on which they report. Since the inception of the framework the benefits of being able to report on the softer outcomes experienced by clients have been acknowledged.

This briefing paper focuses on the process of measuring softer outcomes in advice services, paying particular attention to practical examples of services that are currently measuring softer outcomes. It also offers recommendations for organisations delivering advice services with the aim of encouraging more local authorities to submit data measuring softer outcomes in the future.

# The Importance of Measuring Softer Outcomes in Advice Services

Outcomes advice services deliver for clients are usually based on qualitative data rather than the quantitative data that is traditionally collected by advice services. There is robust evidence that advice services deliver tangible improvements to the health and wellbeing of clients, hence measuring such outcomes can provide a more complete picture of the impact of the service that is being delivered.<sup>1</sup>

In the context of an ongoing reduction in funding, and a rise in demand for advice services, data on softer outcomes can help to demonstrate the real impact that services are making at both local and national levels. This can contribute to making the case for continued investment and for targeting, sustaining and developing services.



“We recognised that in only measuring outputs we were not telling the full story about our impact and the difference that we make”

**Sue Irving, CEO, Dumfries and Galloway CAS**

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1 <http://asauk.org.uk/the-role-of-advice-services-in-health-outcomes/>, <http://www.healthscotland.scot/media/1086/health-inequalities-what-are-they-how-do-we-reduce-them-mar16.pdf>

# Including Outcomes and Indicators for Client Outcomes of Advice in the CAPMF

Until 2017-18 the only indicator in the CAPMF (or MAPMF as it was previously known) that directly related to client outcomes was financial gain. Given the multiple outcomes that clients experience by accessing advice services it was felt that there was value in measuring additional client outcomes. Following discussions with key stakeholders it was agreed to focus initially on measuring three outcomes using an agreed set of indicators. These are described in table 1 below.

The method by which this data was collected was left to individual authorities to determine. This simple approach was taken to facilitate reporting and on the basis that it would be reviewed for future iterations.

Table 1: CAPMF softer outcomes indicators and outcomes 2017/18

Outcome	Indicator
Improved health and wellbeing	<ul style="list-style-type: none"> <li>• I've been feeling more relaxed</li> <li>• I've been feeling physically better</li> <li>• I've been feeling better about myself</li> <li>• I've been feeling more optimistic about the future</li> <li>• I've been getting on better with others</li> </ul>
Improved capacity and ability to cope	<ul style="list-style-type: none"> <li>• I am thinking more clearly</li> <li>• I feel more in control of my life</li> <li>• I am more able to make decisions</li> <li>• I am more able to cope with day to day issues/problems</li> <li>• I know when to seek support and where to get it</li> </ul>
Increased financial stability and resilience	<ul style="list-style-type: none"> <li>• I recognise when I need help to sort out my money</li> <li>• I am confident that I am getting all the benefits/help to which I am legally entitled</li> <li>• I know how much money I have to spend</li> <li>• I can better manage my money</li> <li>• I would be better able to cope if I had an unexpected expense</li> </ul>

# The Approach Taken

The CAPMF demonstrates the impact of investment in advice services at both local and national levels. Accordingly, data across all indicators needs to be collected and reported in a consistent basis. This applies equally to data related to the softer outcomes.

It was agreed to test the feasibility of achieving this consistent reporting by testing the MAP Tool.<sup>2</sup>

The MAP Tool is a web-based system that records financial wellbeing information and provides a common evaluation framework which measures progression towards defined outcomes.

This was the first time that the approach had been tested in Scotland and there were technical issues with adjusting the way information was recorded. Other challenges related to: the collection of baseline data; resource requirements; difficulty in attributing any changes experienced by the client to the service provided and the integration of sustained collection of softer outcomes into existing case management systems. None of the challenges reported were unique to the operation of the MAP Tool. The conclusion from the trial was that, whilst the tool did offer a means of consistently reporting on the softer client outcomes delivered by advice services, at this stage further work was required to enable it to link better with those case management systems currently in use.

As a result, the data collection method to report on the three agreed outcomes and indicators was not prescribed. This approach was taken following the findings of the MAP Tool trial and in recognition of the large number of organisations that provide data for the CAPMF and the wide variations in availability of resources and support. This position will be reviewed in future iterations of the CAPMF.

The following sections of this paper consider in detail some of the methodologies that were, or might be, adopted.

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2 <http://toynbeehall.brix.fatbeehive.com/money-access-and-participation-tool>

## Data Collection

During the 2017/18 iteration of the CAPMF, four of the 32 local authorities in Scotland provided data on softer outcomes. The number of authorities reporting on each indicator has been summarised in table 2 below.

Table 2: Number of data returns reporting on each measure of softer outcomes

Indicator	Number of Data Returns
<ul style="list-style-type: none"> <li>• I've been feeling more relaxed</li> </ul>	3
<ul style="list-style-type: none"> <li>• I've been feeling physically better</li> </ul>	3
<ul style="list-style-type: none"> <li>• I've been feeling better about myself</li> </ul>	3
<ul style="list-style-type: none"> <li>• I've been feeling more optimistic about the future</li> </ul>	2
<ul style="list-style-type: none"> <li>• I've been getting on better with others</li> </ul>	2
<ul style="list-style-type: none"> <li>• I am thinking more clearly</li> </ul>	2
<ul style="list-style-type: none"> <li>• I feel more in control of my life</li> </ul>	2
<ul style="list-style-type: none"> <li>• I am more able to make decisions</li> </ul>	3
<ul style="list-style-type: none"> <li>• I am more able to cope with day to day issues/problems</li> </ul>	2
<ul style="list-style-type: none"> <li>• I know when to seek support and where to get it</li> </ul>	3
<ul style="list-style-type: none"> <li>• I recognise when I need help to sort out my money</li> </ul>	2
<ul style="list-style-type: none"> <li>• I am confident that I am getting all the benefits/help to which I am legally entitled</li> </ul>	2
<ul style="list-style-type: none"> <li>• I know how much money I have to spend</li> </ul>	2
<ul style="list-style-type: none"> <li>• I can better manage my money</li> </ul>	4
<ul style="list-style-type: none"> <li>• I would be better able to cope if I had an unexpected expense</li> </ul>	1

The approaches taken to collect data on softer outcomes vary widely between organisations and projects. The most common approach adopted by the services reporting on the softer outcomes were questionnaires or survey cards. There are also examples of organisations that have embedded softer outcomes into their digital case management systems such as Fife Online Referral Tracking (FORT).<sup>3</sup>

The project outcomes, and the service delivery model will often determine the approach or tool that is used to measure softer outcomes. Where more comprehensive support is provided, there is an opportunity to collect data at various points in the client journey. For brief interventions, shorter surveys or questionnaires might be more appropriate.

A challenge that is evident across organisations that are measuring softer outcomes

3 <https://www.fortsupport.co.uk>

is how to encourage practitioners to apply this approach. Staff have limited resources and tend to focus on service delivery. Providing training and effective communication, including low-level coaching, are approaches that have been used successfully to overcome this challenge. When staff feel comfortable using the new approach, and can see the difference that the advice service they are providing is making to their clients' lives, they tend to be more open to measuring softer outcomes.

The case studies below give a more detailed overview of three different approaches that have been adopted by West Lothian Council, Inverclyde Council and Dumfries and Galloway Citizens Advice Service to measure softer outcomes and which may assist in considering how best to collect data in future iterations of the CAPMF.

## Survey Cards

*West Lothian Council's advice services measure softer outcomes using survey cards and, going forward, are looking to incorporate this into their digital case management system.*

### Approach

West Lothian Council's advice services collect feedback on the service from clients by handing out survey cards at various stages of the client's journey. To capture softer outcomes a few additional questions, measuring similar outcomes to those measured by the CAPMF, were added to the survey card. The next step will be to build in the softer outcomes measurement into the newly acquired case management system, AdvicePro. Collecting feedback from clients digitally will make it easier for both staff and clients to manage and monitor the data.



**Anne Stevenson, Senior Money & Housing Advisor, offers her view on why this is so important:**

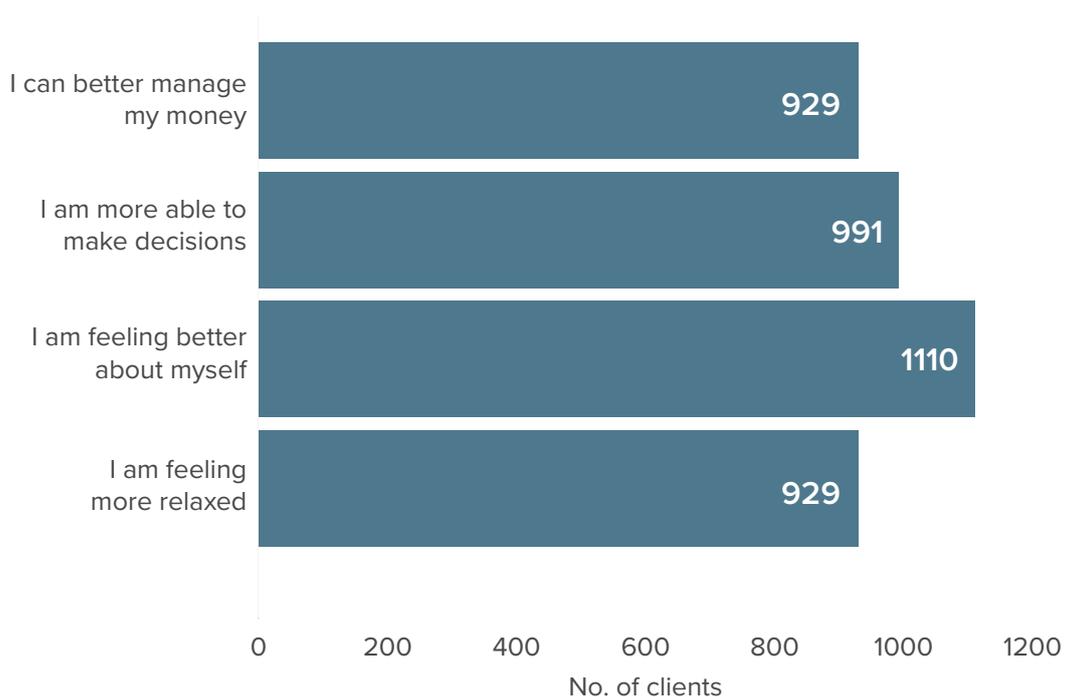
“West Lothian Council Advice Shop recognise that advice giving is making a huge impact on customers lives, not just financially but also improving their health and wellbeing. Reporting on this

as well as financial gains is paramount in identifying exactly what difference our service is making to the citizens of West Lothian. The data is currently being collated through customer survey cards however having acquired new data recording system and on-line tracking and referral system will allow integration of softer outcome recording as part of the roll out.”

## Impact

The key findings from West Lothian Council's data return on softer outcomes in 2017/18 are summarised in Fig 1 below. Collecting data on softer outcomes allows the service to show the impact the service has on clients' lives as well as collecting useful feedback from their clients on the services provided.

Fig 1: West Lothian Council's data return on softer outcomes 2017/18



## Learning

Advisors can sometimes feel uncomfortable giving out survey cards to clients as it is asking about the service that they, as individuals, provide. To address this barrier, regular one-to-one meetings and reminders are sent out to staff.

The type of service provided will also impact on the opportunity to collect feedback from clients. It can be difficult to administer survey cards for clients who are accessing a drop-in service as they might not come back regularly or see the same advisor. If it is possible to incorporate the measurement into an existing procedure this will improve the response rate.

## The Outcome Web

*Measuring softer outcomes is embedded into the advice service provided by the 'Inverclyde Delivering Effective Advice & Support Programme'.*

The Outcome Web was designed to measure softer outcomes as part of the 'Inverclyde Delivering Effective Advice & Support Programme (I: DEAS)', a European funded programme that involves five areas across Scotland.<sup>4</sup> The I: DEAS project aims to offer a client-centred, holistic approach to advice services and measuring softer outcomes is part of the funding criteria for the project.

### Approach

The funders measured performance on two of the softer project outcomes. These were 'the eligible participant has improved money management skills' and 'the eligible participant is no longer affected by debt as a barrier to social inclusion'. Inverclyde Council also set out two further soft outcomes for clients of 'increased capability in household budgeting' and 'increased confidence to deal with finances in the future'.

The Outcome Web was based on a bespoke version of the Outcomes Star and has been built in to the case management system, Fife Online Referral Tracking. The Outcomes Star is an evidence-based tool for both supporting and measuring change, and it allows each participant to self-identify their own support needs and measure their progress throughout the journey.

The Outcome Web has now been embedded into the delivery of the service and is an integral part of the support journey between the practitioner and the client. The initial assessment of the web is used to develop an individual action plan with each client, describing a personalised programme of actions, services and interventions. Following the initial assessment, the Outcomes Web is completed when 100% of the support has been delivered and also six months after the client has stopped receiving support.

### Impact

Including softer outcomes at the heart of the services, and embedding the Outcome Web in the advice process has resulted in a more holistic service delivery model. Practitioners have been motivated by the visible difference they are making to their clients' lives, and as the data collection is embedded in their practice it does not take up additional staff time or resources. However, this approach is relatively resource intensive and might not be appropriate for all services. The Outcome Web might be

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<sup>4</sup> Argyll and Bute, Dundee City, Glasgow, Inverclyde and North Ayrshire

more appropriate for services that are following up with clients over a longer time period rather than shorter interventions.

## Learning

Communication and appropriate training has been an important aspect of the successful implementation of the Outcomes Web. The I: DEAS project includes practitioners across eight different organisations, and in order to train staff to use the system and work across organisations, the practitioners attended a specific training course. This was to ensure that measuring softer outcomes did not become an add on but was part of changing to a more holistic support model with real behaviour change at its core.

## The Short Warwick Edinburgh Mental Well-being Scale (SWEMWEBS)

*Dumfries and Galloway Citizens Advice Service (DAGCAS) successfully tested the measurement of softer outcomes using a validated survey, and the approach is now being rolled out across other services.*

DAGCAS received a grant from the Big Lottery to identify the impact of their services on community wellbeing. The project aim was to improve and measure outcomes at individual, household and organisational levels. For service users, this involved improved access to benefits, money advice and financial education.

## Approach

The Short Warwick Edinburgh Mental Well-being scale (SWEMWEBS) was used to measure softer outcomes. The SWEMWEBS is a short survey made up of seven positively worded statements and measures changes in wellbeing in the general population. The statements include questions such as 'I've been feeling optimistic about the future' and 'I've been dealing with my problems well'.

The SWEMWEBS is now used by Dumfries and Galloway Citizens Advice Scotland and other organisations, such as Rutherglen & Cambuslang Citizens Advice Bureau, to measure softer outcomes. Project staff and clients fill out the survey at both the beginning and end of the final intervention and review. Clients are informed about the process when they access the service and project staff have received training in how to administer the survey and how to ensure that the data is collected anonymously.

## Impact

Initially it was challenging to convince project staff to collect additional data from clients, as a result of both time constraints and concerns that the questions could be perceived as intrusive.

However, as project staff have begun to see the difference they are making to the clients lives, this has encouraged them to support the evaluation process and the approach has been a success. Low-level coaching and training has also been important in making staff take ownership of the process.



**Sue Irving, Chief Executive Dumfries & Galloway Citizens Advice Service, offers her view on why this approach has been successful:**

“We reviewed a number of outcomes measurement tools and settled on SWEMWBS as it was straightforward to use and also, importantly, applicable in an advice setting as many of the tools were aimed at support services. Although some of our staff were initially a little reluctant to use the tool, once they saw the information that came from it they could really see the value of their work which they appreciated. Getting the timing right of using an outcomes measure is important though, as if someone is distressed it could feel intrusive and an additional layer of bureaucracy so the advisers quickly became skilled in introducing this at the right time. We will therefore be rolling outcomes measurement across our offices and projects in Dumfries and Galloway and will feed back the findings to our funders.”

## Learning

Feedback from advisors highlighted that it is important to consider when data on softer outcomes is collected. As many clients are at a crisis point when they access the service, it can sometimes be more appropriate to measure softer outcomes retrospectively. By asking clients to report on softer outcomes after the initial crises is under control, advisors have seen better engagement from clients. The next step for the service will be to recruit financial capability staff which is hoped will allow for more in depth work around measuring softer outcomes.

# Conclusion

In times of declining investment and increased demand for advice services, data on softer outcomes can provide a more informed picture of the impact on individuals that advice services deliver. This facilitates effective decision making in regard to service transformation and future investment and also enables services to be targeted towards achieving agreed outcomes.

Despite the benefits associated with collecting data around softer outcomes, the number of advice services reporting on softer outcomes is currently relatively limited. This appears to be as a result of a lack of client engagement opportunities and a tendency to focus resources on service delivery. Consideration should be made by advice services of proportionate methods they can use to report on the multiple benefits experienced by their clients.

# Recommendations

1. Choose a data collection approach that suits the service delivery model. Some services lend themselves better to short questions and others are useful for long-term engagement. Timing is critical.
2. Involve those who will administer the data in the process of introducing the measurement of softer outcomes and provide appropriate training. Low-level coaching can help staff to take ownership of the process.
3. Embed the measurement of softer outcomes in service delivery so that it does not require additional staff time and resources.
4. Pilot the data collection method as this offers an opportunity to test the approach in one area before it is rolled out across the full service.
5. Use a recognised measurement tool to help ensure the validity and consistency of the approach taken.

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