Guide to measuring client outcomes

A partnership approach

Measuring client outcomes to improve services

Funding agencies are increasingly interested in hearing about service delivery outcomes, that is, understanding what has changed for clients as a result of services they have received.

The Data Exchange streamlines outcomes reporting, and also shares information back with organisations, to enable them to continue to improve the way they deliver their services. This ‘data exchange’ also plays a key role in evaluating the impact of community programs and in developing new social policy initiatives for the future.

1. What are outcomes?

Outcomes are the changes that happen as a result of what you did, that is the services you provided to your client(s). The activities or actions themselves are often called ‘outputs’.

An outcomes framework is a tool to help you link what you are doing to what you want to achieve for your clients, and to work out how you will measure progress towards success.

Ask yourself:

- What is the problem/issue/situation that our service is seeking to address?
- What would success look like?
- What are the changes we are hoping to see in our clients?
- How can we measure that change?

This guide will help clarify these concepts and provide practical steps you can take to better measure outcomes in your own organisation’s context.

2. Why is it important to measure outcomes?

Once you are clear on what change you are hoping to see in your clients, you then need to focus on what you can measure. Measuring outcomes gives you the evidence of what has changed for your clients, progressively and over time.

By focusing on what you can measure, and by recording quality outcomes data, you can:

- demonstrate to others the positive changes you are making to people’s lives;
- prioritise and allocate resources where they are most needed / can make the most difference, and modify your service delivery as needed; and
- know that you are making a difference to your clients and the community.

In the context of the Data Exchange this means that you can:

- Compare how client outcomes vary across outlets, identify outlets with different results for the same program, investigate the causes and make changes to service delivery, if needed;
- Compare how client outcomes vary across client groups, and use this improved understanding to better target your services;
- Identify particular areas or client categories in need of greater attention, or a different kind of support;
- Determine if client outcomes as a whole are getting better or worse over time, by comparing client outcomes for one reporting period to previous reporting periods.

3. Program intervention logic – a way to define outcomes

1. Start by looking at the problem (**issue**) you want to resolve, and the changes and results (**outcomes**) you want to see. Then keep this goal in mind as you work through the other steps.
2. Consider what resources (**input**) you have to work with in your organisation; this can be your grant money, staff and volunteers, and other resources such as computers and equipment.
3. Work out what **actions** you need to take and how you will organise them - these will be broadly outlined in your grant documents, in accordance with program specific guidelines (Appendix B).
4. Complete these planned actions in sessions with your clients and record what you did (**output**).
5. In the 'partnership approach', measure any changes in your client's situation at appropriate times (short, medium and long term **outcomes**), using your own tools, or using the Data Exchange SCORE.

Here is an example, adapted from "Making sense of evaluation: a handbook for everyone", published by the Social Policy Evaluation and Research Unit in New Zealand

- This is a deliberately simplified scenario, for a situation where you are trying to assist penguins in need. Using the concepts above, you can see the difference between an **output** (jumpers) and the **outcome** (warm penguins). This outcome is the change that your actions brought about.
- In real life, and in your organisation, things are likely to be more complex. This example, for instance, does not address any of the assumptions which have influenced your decisions, nor does it include any other external factors which you cannot influence.
- What this model may help you with, is to be clear about **what** you are trying to achieve, what you are doing and **how** you're doing it, and **why** you're doing it in the first place.

See Key outcomes measurement terms, and Data Exchange examples on page 6.

4. Beginning with the end in mind

Some sample questions might help you to work out what change you hope to see in your clients, and what factors you can measure and report in the Data Exchange, using SCORE (Standard Client Outcomes Reporting).

Step 1 – at the beginning.. : Why are we doing this? Who do we want to reach? What is the problem we are trying to solve? What was the reason this program was created?	This is the over-arching **purpose** for the program, setting out the **needs** and **objectives**.
Step 2 - … looking towards the end (Step 7): What is the big-picture goal? What end outcome do we want for our clients? What are we working towards?	These are the **long-term outcomes** we hope to see in our clients' lives. You can also think of this as the **impact** you hope your service will have on the community.
Step 3: What resources are needed? What preparations will we need to do? Who do we work with? Who will participate / use this service?	These are **inputs:** our **clients / participants** (individuals or groups). You may also involve support persons and **delivery partners** at this stage.
Step 4: What did we do? When and where? Who attended? How many? What were the service types delivered?	These are **outputs.** They are about delivering the sessions, the workshops or other activities, in other words the services provided to our clients.
Step 5: Were there immediate changes for the client? Were some issues able to be resolved early? Did the client feel that you had listened and understood their issues?	You will want to record an initial **SCORE** to have a baseline, usually at the start of your service delivery. Then you can record **short-term outcomes** in SCORE (e.g. client goal setting and satisfaction).
Step 6: What progress is being made towards the client's long-term goals? What changes have there been so far in the client's knowledge, capability or situation?	These **medium-term outcomes** can be recorded at regular intervals to demonstrate progress in one or more of the individual SCORE domains.
Step 7 – looking back to where we started: What was the reason this program was created? Did we achieve what we set out to do? What are the resulting changes in the client's circumstances?	**Long-term outcomes** are usually recorded towards the end of service delivery, where you assess changes in the client's situation compared to the reasons for seeking assistance, and the objectives set out at the start.

5. Accessing your outcomes data via Data Exchange reports

The better the quality of the data you record, the more insights you can gain into the outcomes of your clients. Data and insights are valuable tools that you can use to make changes or adjustments, in order to provide the best possible service to your clients and their communities.

To help you check your data quality, as well as analyse and interpret this information, you can access a number of interactive reports via the 'MyDEX Reports' button in the Data Exchange portal.

- All organisations can access the Data Exchange **'standard reports'**, which reflect the 'priority requirement data' collected;
- The expanding '**partnership reporting' suite** is available to those organisations that provide additional data **focused on their clients' outcomes**. The Reading reports guide sums up the content of the different reports, and provides guidance on the ways in which you can filter and interrogate your own reported data.
- Task cards are also available on the Self-service reports web page. They provide step-by-step instructions on how to navigate the Data Exchange reports.

6. How all this links to SCORE

Once you have identified the changes you want to measure in your client, you are ready to select which SCORE categories you want to use, and record your initial assessment of your client's situation on a scale from 1 to 5. As time goes by, you can record changes at regular intervals, as well as towards the end of your client receiving a service from you.

In the example above, you would probably choose to record the initial assessment of the cold penguins as a 1 or 2 in the 'physical health' domain (within the Circumstances category in SCORE). While jumpers are being knitted there may not be any improvement, but by the end of the process, the now warm penguins may score a 4, or even a 5.

The different SCORE domains you can use to measure client outcomes in the Data Exchange are below:

Figure 1 - SCORE outcome domains

SCORE outcome domains

CIRCUMSTANCES	GOALS	SATISFACTION	COMMUNITY
▪ Age-appropriate development ▪ Community participation & networks ▪ Education & skills training ▪ Employment ▪ Family functioning ▪ Financial resilience ▪ Housing ▪ Material wellbeing & basic necessities ▪ Mental health, wellbeing & self-care ▪ Personal & family safety ▪ Physical health	▪ Changed behaviours ▪ Changed impact of immediate crisis ▪ Changed knowledge & access to information ▪ Changed skills ▪ Empowerment, choice and control to make own decisions ▪ Engagement with relevant support services	▪ I am better able to deal with issues that I sought help with ▪ I am satisfied with the services I have received ▪ The service listened to me and understood my issues	▪ Community infrastructure and networks ▪ Group / community knowledge, skills, attitudes and behaviours ▪ Organisational knowledge, skills & practices ▪ Social cohesion

7. Additional support, resources and further reading

Please discuss any questions around measuring outcomes with your funding arrangement manager. You can also seek technical assistance from the Data Exchange Helpdesk.

Data Exchange resources:

- **Data Exchange Protocols**: a support manual intended to guide the consistent implementation of the Data Exchange framework, by providing practical information for managers and front-line staff. Of particular interest in relation to outcomes are:
  - Section 6: Collecting 'partnership Approach' data;
  - Section 7: Recording client and community SCOREs.
- **Protocols Appendix A**: a list of programs using the Data Exchange, and the service types applicable to each program activity.
- **Protocols Appendix B**: policy guidance on entering data into the Data Exchange in a consistent way that best reflects the program activity being delivered; assistance on SCORE outcomes and partnership data collection; support for consistency in reporting within program activities, and in the interpretation of the Protocols across funded organisations.
- **Fact sheets** related to measuring outcomes and providing high quality data:
  - A partnership approach to reporting outcomes
  - Using SCORE to report outcomes
  - Additional guidance for using SCORE with clients
  - The importance of data quality
- **Practical step-by-step instructions**:
  - Task cards and e-Learning modules on the Training resources web page
  - Recorded webinars, via the Webinar Library button on the home page
  - SCORE Translation matrix, for some common clinical tools, especially for Families and Children program activities.

Reading more about outcomes measurements and evaluation in general

More information on measuring outcomes and using SCORE is available on the Data Exchange Policy Guidance page.

There are also a lot of interesting and expert materials out there, if you are looking to learn more about outcomes measurement and evaluation.

A good place to start might be the following booklet, referenced above, which provides a wealth of information in plain language: "Making sense of evaluation: a handbook for everyone" was published in 2017 by the Social Policy Evaluation and Research Unit (Superu) in New Zealand.

The Australian Institute of Family Studies has an information hub for evidence, resources and support for professionals working in the child, family and community welfare sector. It is called Child Family Community Australia (CFCA), and has a number of useful publications.

8. Key outcomes measurement terms, and Data Exchange examples

Inputs	The resources (including funding, people, time and infrastructure) invested by your organisation in the program, activity or initiative.
Actions	In terms of outcomes measurement, the ‘action’ is what you do so that you can provide a service. It is the process that transforms the inputs into something you can use (for example, the training of volunteers or the setting-up of a workshop).
Outputs	The measurable products or services the organisation delivers to its clients and the community. In the Data Exchange these are recorded as ‘session’ and ‘service type’ details.
Outcomes	The changes or benefits to the clients and/or community of the service delivered by your organisation. Although the intention is usually to achieve a positive long-term outcome, it is important to remember that an outcome may also need to be recorded as ‘no change’, or even a ‘negative change’, depending on the type of service and the individual client’s situation.
- Short term outcomes	Immediate client changes or benefits, as a result of you providing initial assistance. The first SCORE is recorded as close as possible to the start of a client accessing a service.
- Medium term outcomes	The changes along the way, while the client is accessing your services. This is often where you can start to see changes in behaviour, practice or decisions. SCORE can be recorded at intervals throughout a client’s access to a service.
- Long-term outcomes	The changes and differences in client circumstances towards the end of receiving services from your organisation. This can be due to well-established changes in knowledge, capability and behaviours. SCORE is recorded towards the end of a client receiving a service.
Impact	The overall change at the end of the program or activity. This term is sometimes used to describe long-term outcomes, but can also be a broader measure, such as changes to a community or society as a whole. There is no specific way to record this in the Data Exchange.
Evaluation	A systematic process to make an evidence-based assessment of an activity, a service delivery program or initiative. For grant recipients, evaluation milestones and criteria are set out in their funding agreement. Please note that data reported via the Data Exchange is only one of the components of such an evaluation.
Program logic	A diagram that describes the causal chain between the activities you deliver and the intended client outcomes. (see Section 3 for more details).
Evidence	Facts which can be measured or demonstrated. Examples in the Data Exchange include client details, outlet information, session dates, service types, demographic information etc. Through the ‘partnership approach’, evidence can be collated on client outcomes in terms of goals, circumstances and satisfaction, as well as on the meeting of community needs.