

## Triple Aim: How to undertake the 3 part data review

### Introduction

A key part of the triple aim approach is to understand the needs and assets that service users have within their system. Whilst focusing on needs is an important part of the process, solely using this approach can focus only on deficiencies within a population. This is why it's also key to consider an assets based approach, which suggests that all individuals and populations have multiple strengths and capacities which could be harnessed to make them thrive more fully.

**Needs** are typically defined as problems or deficiencies within the population that require fixing via an intervention

**Assets** can be described as the collective resources that individuals and communities have at their disposal, which can help promote health and wellbeing. These can include:

- **Individual** – personal resilience, individual talents
- **Community** – Community groups, social clubs, resident's associations
- **Organisational** – Faith groups, coffee shops, libraries, health and social care services, barbershops

### Three-part data review process

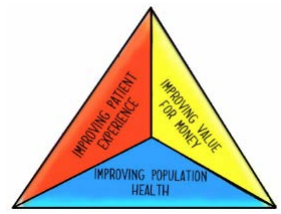
One way in which you can explore the assets and needs within a population is through conducting a three-part data review. This includes looking at:

- 1. Reviewing available data on the population to identify overall patterns** that impact the chosen population
- 2. Engagement with care teams and professional providing care or supporting the population** to understand their perspective on the chosen population's greatest needs and assets
- 3. Service user and citizen interviews/engagement** to understand their experience and perspective; to understand what is important to them, the real-world challenges they face in managing their health and living situations, and what might help.

The following templates offer you ideas for how to record your team's learning as you undertake the data review. Please feel free to adapt these templates so they work for your particular context.

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## Part 1: Quantitative Data Review

Review available data on the population to identify overall patterns that impact your chosen population. Use the worksheet to make notes. Note, this needs to be a quick and pragmatic exercise, taking no more than 2 weeks.

### **What do we already know?**

Reflect on what we already know about the population from previous data.

### **What to focus more data analysis on?**

Discuss what other areas/factors it would be really useful to look at to better understand the population/check any theories you have.

You will need to have data around **service usage**. This could include for example:

- ELFT inpatient admissions / frequent attenders
- ELFT Crisis Team admissions / frequent attenders
- Primary Care usage
- A&E attendances

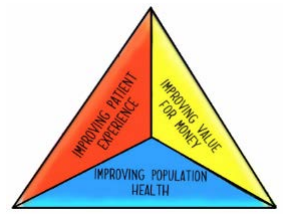
You may want to look at some of the **broader factors that can influence people's experience**. This may help you to understand your theory of change:

- Lifestyle/health behaviours, like smoking, alcohol, substance misuse
- Potential inequalities by protected characteristic, such as age, ethnicity, gender, disability, sexuality, etc.
- Geographical differences
- Impact of physical and/or mental health co-morbidities
- Wider determinants of health, such as housing status, access to benefits, employment status, education status, deprivation

Be pragmatic about how many things you look at, guided by the expertise of your project group and discussion with service users/carers.

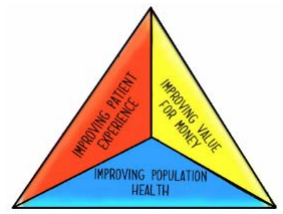
### **What data to look at?**

1. Start by looking at data from ELFT systems
2. Identify key external data sources with partners and review if possible.



## Worksheet 1 – Quantitative data review

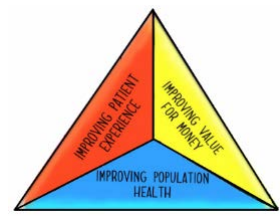
<u>Understanding what data is available</u>	
<p>What do we know about the needs and assets of this population from existing data?</p>	
<p>What data do we have access to at ELFT that might help us learn more about the population?</p>	
<p>What external data would be really useful to look at? Who could help us get access to this?</p>	



**Distilling Learning**

Summarise what you learnt from this data? What themes emerged in terms of needs and assets?

What, if anything, surprised you? What new questions do you have?



## **Part 2 – Questions to use with care teams and professional providing care or supporting the population**

Below is a worksheet with questions to have some conversation with care teams or professionals that work with or support the population, to understand their perspective on the chosen population's greatest needs and assets. You can use worksheet 2(b) to distil learning from the engagement work undertaken.

### **Worksheet 2(a) Questions**

#### **Learn about how each care team or professional supports patients or clients:**

What services do you deliver to this group? Who directly supports the patients? What eligibility criteria do you have in place, and why? Do you see any weaknesses/problems in this?

#### **Get people's perspectives on when things go wrong:**

What is preventing people from this group from thriving? What is contributing to people deteriorating or getting into crisis? What keeps you up at night? Where to get stuck in supporting people in those populations?

#### **Get people's perspective on the system:**

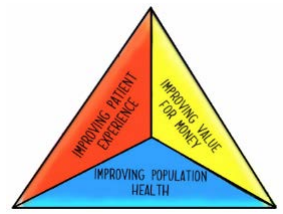
What do you think is missing from the broader system in the way we support people from this group? Do you feel the system supports people at the right time?/in the right way? If not, what changes should we make?

#### **Get a deeper understanding of assets:**

What strengths and assets can you identify in this group that helps them stay well? How good do you feel the system is at recognising these strengths and assets? How good do you feel the system is at leveraging, supporting and strengthening these assets?

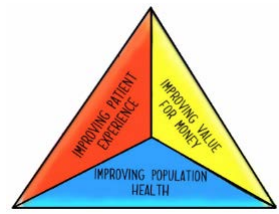
#### **Blue-sky thinking:**

If you could create/design a new system for this population, what would it be? What would the key elements be?



## Worksheet 2(b) Distilling your learning

<p>What have we learnt about the most important assets to people, that we may be able to strengthen/leverage in the project? What have we learnt about the root causes of high utilization?</p>	<p>What needs are unmet?</p>
	<p>What assets do people draw on?</p>
<p>What interventions have been suggested from what we have learnt?</p>	
<p>Any other learning?</p>	



## **Part 3 – Service user/Citizen Interview**

### **INTRODUCTION**

A vital part of the 3 part data review is getting the perspectives of the people you serve. You will need to interview 10 to 15 people from the population you have identified to work on to understand their perspectives on their assets and needs. The goal of these interviews is to understand:

- people's experience and perspective
- what is important to them
- the real-world challenges they face in managing their health and living situations
- what will help them thrive

### **STEP 1: FIND PEOPLE YOU CAN SPEAK TO**

People need to be willing to speak to you about their personal experience of a challenge in their life. You will need to interview them for approximately 30 - 60 minutes, in a place where they feel safe to have the conversation. Where applicable, it can be really useful to interview formal or informal carers of service users/citizens interviewed to provide further context.

### **STEP 2: CLARIFY HOW INFORMATION WILL BE USED**

Firstly, be clear about how the information gathered from this exercise will be used; for example:

- The purpose of this interview is to guide our work to improve our services and how we support (insert population group). (Provide further detail on the Triple Aim work you are involved in).
- We record your initials on the interview form, to help with our own record-keeping. These will not be shared with anyone else.
- We will also record some basic equalities information, to help understand if any patterns emerge.
- In general, we will be looking at themes, but we may want to include a specific experience/piece of feedback in materials we create – this will be anonymous. Let us know if you're not happy to have specific examples used in this way at the end of the interview.

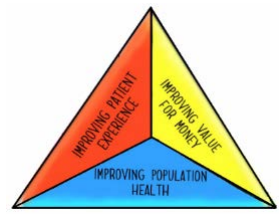
### **STEP 3: HAVE A CONVERSATION & LISTEN CAREFULLY**

We've included some pointers on the following pages that might help you get the best out of a conversation you have. Of course remain curious about who you are talking with and treat them with respect as they are sharing their experiences.

***NOTE: If you think there is a safety risk at any point in the interview, suggest the person speaks to a clinician at the end of the interview.***

### **STEP 4: REFLECT ON WHAT YOU HAVE HEARD**

Following the conversation, take 15 minutes to reflect on the conversation, using the prompt questions provided.

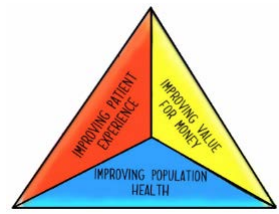


## SOME TIPS FOR A GOOD CONVERSATION

Here are some principles we keep in mind when conducting interviews to spur insight and innovation:

<p><b>BUILD RAPPORT</b></p> <p>Don't jump straight into emotional questions, have them talk you through the facts first and then come back to ask them how it feels / felt.</p>	<p><b>LET THE PERSON SPEAK</b></p> <p>This is not a rushed Q&amp;A. Let your collaborator finish their sentences even when they pause – this is about their experiences.</p>
<p><b>FOCUS ON “HOW” NOT “WHAT”</b></p> <p>Try to get your collaborator speaking about the nature of the experience, rather than just the steps involved. The “what” will emerge from the “how” anyway.</p>	<p><b>LOOK &amp; LISTEN BETWEEN THE LINES</b></p> <p>Take into consideration non-verbal cues such as facial expression. Confirm your guesses with questions. Listen also for interesting comments that stop short - prompt them to complete for more info.</p>
<p><b>USE OPEN-ENDED QUESTIONS</b></p> <p>Most of the conversation should be based on open questions like: “Tell me about...?” or “Describe what happened when...”. Use follow up questions to gain more insights.</p>	<p><b>LET THEM WANDER (A LITTLE)</b></p> <p>Sometimes the most interesting learnings come from unexpected diversions. If they start wandering let that happen a little</p>
<p><b>HELP THEM DEFINE THE ALTERNATIVE</b></p> <p>Prompting your collaborator to describe an improved alternative experience helps expose what they liked and didn't like about the actual experience. Ask “How could it be better?”</p>	<p><b>HAVE THEM SHOW YOU</b></p> <p>Maybe ask them to visualise the story they are telling and draw it out.</p>

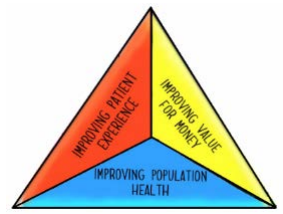




### Worksheet 3a: Service user/Citizen Interview & Discussion Guide

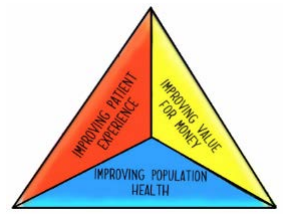
Date	Initials	Interview No:
<p><b>INTRO</b> Tell me about a typical day for you? What does a good day look like? How has this changed over the years?</p>		<p><b>LOOKING BACK ON AREAS OF YOUR LIFE...</b> What did you struggle with? Who helped / did not help? What was helpful or not? How did you feel? What would you change?</p>
<p><b>AND NOW...</b> What do you need to manage? Where do you struggle now? Who helps / does not help? What do you wish for?</p>		<p><b>OVERALL</b> Who are the most important people in this situation? What supports and services are most critical? What's missing? How might you help others in a similar situation? What did I not ask that I should have?</p>

<b>Gender:</b>	<b>Ethnicity:</b>
<b>Age band:</b> Under 18 / 18-39 / 40-59 / 60-79 / 80+	
Please adapt this table if other areas of focus would be useful for your project	



**Worksheet 3b: Service user/Citizen Interview Summary**

<b>Interview Date:</b>	<b>Interview Number:</b>
<b>Question</b>	<b>Answer</b>
<b>What strengths and assets are reflected in the answers?</b>	
<b>What needs are going unmet?</b>	
<b>What did the system do that made it worse?</b>	
<b>What gaps have been identified?</b>	
<b>Any other themes emerging?</b>	



### Worksheet 3c: Service user/Citizen Interviews – Summary of All Interview Findings

**Common themes from most interviews:**

<p>What have we learnt about the most important assets to people, that we may be able to strengthen/leverage in the project? What have we learnt about the root causes of high utilization?</p>	<p>What needs are unmet?</p>
	<p>What assets do people draw on?</p>
<p>What interventions have been suggested from what we have learnt?</p>	
<p>Any other learning?</p>	