

# An Overview of Soft Outcome / Informal Learning Measurement Tools

Clayton Anderson, The Research Centre, City College Norwich

## 1. Introduction

Soft outcomes can be described as:

*“outcomes from training, support or guidance interventions, which unlike hard outcomes, such as qualifications and jobs, cannot be measured directly or tangibly. ‘Soft outcomes’ may include achievements relating to:*

- *Interpersonal skills (e.g. social skills and coping with authority)*
- *Organisational skills (e.g. personal organisation and the ability to order and prioritise)*
- *Analytical skills (e.g. the ability to exercise judgement, managing time or problem solving)*
- *Personal skills (e.g. insight, motivation, confidence, reliability and health awareness)”*  
(Dewson e. al., 2000).

People often need help and support in nurturing their soft skills, which is where a great deal of work is conducted in the voluntary sector and beyond. To allow organisations to do this work, funding is required. With multiple organisations applying for money from the same allocations of funding, they need to be able to show the impact they have and the difference they make to clients who use their services.

Soft or intangible outcomes have been seen as notoriously difficult to measure (Butcher and Marsden, 2003). The most commonly used method has been to use case study examples showing “the journey” a person has experienced whilst working with an organisation. This however is generally not enough for funders and other organisations who require firmer evidence of the difference being made such as graphs and figures. As the competition for funding increases, organisations must be able to show more than what they do and what people think of their service. They must also find quantifiable

ways to show how their service makes a difference.

The purpose of this article is not to critique the various soft outcome measurement tools available but draw attention to the different options organisations have and features the different tools offer. It is important to pick the correct soft outcomes measurement tool for any organisation. There is a fine balance between its cost, flexibility, usefulness to client / worker and the end product the system may produce.

## 2. The Outcomes Star

*“The Outcomes Star is an approach to measuring change when working with vulnerable people. We call these measurable changes outcomes. It is used within the key work process and is integrated within assessments and reviews”* (Triangle Consulting, 2006).

The Outcomes Star was originally devised by an organisation called Triangle Consulting on behalf of St. Mungo’s; London’s largest homelessness organisation. The concept was to use the Outcomes Star as a tool for key workers to identify the effect their interventions were having on the people they were working with by highlighting outcomes achieved.

During the development of the Outcomes Star, extensive consultation took place with both key workers and managers before the tool was piloted across four projects. The London Housing Foundation became involved to help maximize the potential benefits of the Outcomes Star by supporting the use of the approach within three major London agencies. Meanwhile, a local authority in Rochdale commissioned Triangle Consulting to aid their outcomes focus in relation to Supporting People. A decision was made to adapt the existing Outcomes Star to

measure client progress in ten local pilot agencies. The use of the Outcomes Star in those ten agencies further developed the tool enabling a more explicit and client-oriented version of the star scales and the model of change.

Full development of the Outcomes Star covered a four year period in which 14 organisations tested the Outcomes Star using an action research approach which included changes in the wording of the scales, the tool's presentation and its appropriateness for use by key workers in their individual settings.

The Outcomes Star approach aims to capture a client's 'Journey of Change' which is defined as

*"a scale outlining the key steps in a transition from dependence to independence"* (Triangle Consulting, 2007a).

The Outcomes Star is the top level of the system which has further scales of progression within called the 'Ten Ladders'. The 'Ten Ladders' could also be explained as ten different outcome areas which are listed as:

- Motivation and taking responsibility
- Self care and living skills
- Managing money and personal administration
- Social networks and relationships
- Drug and alcohol misuse
- Physical health
- Emotional and mental health
- Meaningful use of time
- Managing tenancy and accommodation
- Offending

Each of the 'Ten Ladders' has ten steps. Each of the ten steps corresponds with a score on the star scale. If for example, a client had identified themselves as being at step three in any of the 'Ten Ladders' mentioned previously, they would mark a three on their outcomes star for that area.

When the client and key worker revisited the client's star, they would again follow the same process, using the 'Ten Ladders' to identify where they should place their score on the scales. Once a star has been completed, the data may be analysed using a

*"simple Excel tool for analysing a limited amount of information from the Star"* (Triangle Consulting, 2007b).

The 'Number Cruncher' is not intended as a long term solution as it is only able to compare two readings as opposed to being able to build up a long term picture of the client's progress.

The latest version of the Outcomes Star along with training and guidance notes is available via the London Housing Federation. It incorporates the previous version of the Outcomes Star, with newly implemented feedback from organisations such as St Mungo's, Thames Reach, Single Homeless Project, and The Passage as well as a range of organisations that were working on a similar project in Rochdale. Specialist stars for Drug and Alcohol, Domestic Violence, Parenting, and Mental Health projects are in development.

### 3. SpiritLevel

*"SpiritLevel is a useful and reliable tool that measures and assesses quality of life across a broad range of users, thus enabling soft outcome or distance travelled to be successfully monitored"* (Fairbridge, no date).

A group of voluntary sector organisations identified the need to demonstrate the value of their work to internal managers and trustees as well as external forces such as funders. As a result, work was undertaken to identify a suitable and credible tool to measure the progress of young people, without bias.

The initial process of development involved identification and evaluation of existing tools in the sector. It was concluded that all of the tools reviewed had some characteristics

which made them unsuitable for the desired purpose. Consequently, a decision was made to pilot a quality of life (QQL) profile which had been previously developed by the University of Toronto.

Piloting commenced in the autumn of 1999. In March 2000, progress to date was presented at a collaborative seminar jointly held with the then Department for Education & Employment. Each of the projects involved in piloting asked the young people who used their service to complete the QQL profile providing the initial baseline measure for their 'quality of life'. The QQL profile was completed again after six to eight weeks and once more after a similar period of time.

Initial piloting was reported as encouraging but not conclusive, with many improvements and modifications necessary to make the system fit for purpose. Further testing was required with a larger number of organisations and young people. The paper based version of the model needed to be refined with issues of literacy and the production of the QQL profile itself addressed. The initial phase of development was complete at the end of 2000 and concluded with an interim report.

The next stage of development shortened the QQL tool by half and provided a software version allowing the QQL profile to be completed on computer. Literacy issues were overcome by including a voice-over in the software. Furthermore, scores were calculated automatically and profiles instantly produced.

The QQL profile looks at various areas of life such as health, friendship, values and control. The profiles themselves consist of 72 questions which are completed as two sequences of 27, then two sequences of 9 questions. Once all questions have been completed, a profile is created which may be stored, viewed or printed. The software records up to 50 profiles per user and a graphical display is available presenting a maximum of nine profiles as bar charts which will help to identify any trends in the QQL profile.

Training for SpiritLevel is a requirement and lasts for approximately two hours. The software package may not be sold separately. Training currently costs £99 per person and the SpiritLevel software costs £15. Licenses are required for the software package to be used and are available from £6 to £10 per user.

#### **4. Rickter Scale**

*"The Rickter Scale provides you with an innovative non-paper based assessment and evaluation tool. Its effectiveness stems from the fact that it provides a framework for engaging clients in motivational solutions-focused work"* (The Rickter Company, no date).

The idea behind the Rickter Scale first appeared in 1993 when Rick Hutchinson, co-developer of the Rickter Scale with Keith Stead, was working with young offenders in County Durham. Rick's job at that time was to help reduce the young people's offending behaviour whilst simultaneously reintegrating them into society.

It was identified that the current 'interview process' was a potential barrier to positively engaging with clients, so a tool was required to facilitate discussion. Some clients were being identified as not achieving, as were the teams working with the clients due to the fact that specifically identified hard outcomes were not being met, or clients were re-offending. Although the clients had not necessarily met their hard outcome targets, other issues had been addressed in their lives such as drug and alcohol use or self-confidence. The addressed issues were equally important achievements but there appeared to be no way of measuring this.

The Rickter Scale is a hand-held board with a selection of ten headings down the left hand side which make up the 'Frame of Reference' that reflects the client's issues. Alongside each heading is a horizontal scoring scale which slides up from '0', 'not happy at all' to '10', 'very happy'. The headings which make up the Frame of Reference are set as

standard (e.g. Money, Stress, Alcohol, and Health) but may be changed at a cost with magnetic strips which are attached to the existing Rickter Scale board over the existing 'Life Board' headings.

The board is handed to the client so they have control over their responses to a series of solution-focused questions asked by the interviewer. When the client and interviewer work through a second or future interview together, any changes can be acknowledged and an action plan / goal setting exercise would be discussed.

The Rickter IMS-ONLINE (Information Management System) compliments the system and was specifically designed for use by large organisations, partnerships or organisations operating from multiple sites. The system is web-based and allows the tracking of an individual's progress, and aggregation and analysis of large sets of data of both of a qualitative and quantitative nature. Reports are also generated using Seagate Software / Crystal Decisions package 'Crystal Reports'.

To gain access to the Rickter Scale and use it in an organisation, there are several steps to follow. The first stage is a 'no fee' presentation which lasts approximately two hours. Following the presentation is an 'optional' consultation from The Rickter Company which allows the organisation to develop specific Frames of Reference to reflect their own client's needs and develop a strategy to ensure effective implementation into the organisation. The cost for this consultation is £800. Boards and possible additional Frames of Reference (if anything additional to the 'Life Board' is required) cost £85 per board (including documentation, computer software and carrying case), plus £25 per additional 'Overlay' required to be placed on the board. Training is a requirement at the cost of £100 per person with a minimum group size of 8, maximum of 16 with one free place allocated to a manager per session. Optional 'Follow Up' events or 'Refresher' days are also available at the cost of £800 per day. A quality assurance package is offered by The Rickter Company

with individual requirements to be discussed directly with them. All prices are exclusive of Rickter Company expenses incurred and VAT charged at 17.5%.

## **5. The SOUL Record**

*"The SOUL Record is client focused / learner centred and focuses on solutions rather than problems. The system concentrates on what an individual can do, as opposed to the things they have been unable to achieve and it is intended as a positive experience for clients"* (The SOUL Record, 2006).

The SOUL (Soft Outcomes Universal Learning) Project grew out of a need identified by the Norfolk voluntary and community sector to evidence the progression of their clients in relation to soft outcomes / informal learning. A group of voluntary organisations in Norfolk, headed by Norwich and Norfolk Voluntary Services (NVS), therefore took the initiative of devising a research project and commissioned The Research Centre, City College Norwich, to achieve a number of objectives; one of which was the development of a system to monitor and measure progression in 'soft' outcomes. The SOUL Project received funding from The Big Lottery Fund (formerly the Community Fund) and commenced in September 2003, continuing to the end of February 2006. Further funding was obtained from ChangeUp to roll The SOUL Record out regionally through the development of licensed trainers.

The SOUL Project was split into three phases. Phase one of the research involved a comprehensive literature review of soft outcomes and related themes and saw the researchers working closely with six local organisations in Norfolk (*Benjamin Foundation, Break, Creative Arts East, College in the Community, Norwich Community Workshop, and North Lynn Discovery Project*), selected for geographic spread and diversity of client group, with the purpose of mapping the soft outcomes relevant in the sector. The researchers

embedded themselves within the six organisations (e.g. they made a clay pot with service users at Norwich Community Workshop, they made tea and watched Eastenders with the young people at the Benjamin Foundation and took part in creative arts activities in rural Norfolk with Creative Arts East) so they could fully understand what happened within the organisations for themselves. Over 80 soft outcomes were identified which enabled a framework for monitoring and measuring soft outcomes to be developed, called 'The SOUL Record'. The phase concluded with dissemination events in both Norwich and King's Lynn.

The SOUL Record was trialled and developed during the second phase of research from October 2004 to September 2005 by over 40 local organisations, providing a good spread in terms of both geographic location and client group. The organisations involved agreed to become 'action researchers' in this phase, trialling the embryonic system and reporting back their experiences of using the system. Participating organisations were encouraged to trial the generic system and develop it in consultation with the researchers to reflect the specific needs and distinctive contribution of their own organisation. Organisations were given necessary support and provided feedback via three workshops held over the course of the year (allowing for two complete action research cycles between workshops) and through site visits, observations, group interviews, e-mail and telephone contact.

The third phase involved the write-up of the project, research into the long-term sustainability of The SOUL Record and a national conference which was attended by over 300 delegates. Since the SOUL Record launch in February 2006, over 600 users and 15 trainers have been trained across the country.

The SOUL Record is a method of measuring soft outcomes / informal learning in a way which benefits the client and is solution focused. It is useful for the client to help them to see the progress they are making, the

worker as an ice breaker and a diagnostic tool; identifying where a client or learner may need some extra help or support, and for an organisation in providing evidence of the work being undertaken with their clients. The SOUL Record is a resource for both one-to-one work and showing the progress made by large groups or projects. Talking a client through The SOUL Record is an important part of establishing a relationship with that person and building up trust with vulnerable groups of people.

Organisations may select from a range of questionnaires, worksheets and observation sheets so they can use the resources best suited to an individual's needs. Soft outcomes for adults are divided into three main areas: 'attitude', 'personal / interpersonal' and 'practical', whereas for children and young people, soft outcomes may be measured against the five outcome areas of Every Child Matters (*i.e. Being Healthy, Staying Safe, Enjoying and Achieving, Making a Positive Contribution, Economic Well-Being*). The SOUL Record is also RARPA (Recognising and Recording Progress and Achievement) compliant, a Learning and Skills Council initiative.

To help users collate results from The SOUL Record, each pack is supplied with a Spreadsheet Results Package (SRP). Results are placed into the system and it calculates totals and averages, before automatically creating graphs for the SOUL Record user. These graphs may be shown to the client to demonstrate progress or used as evidence for a funder, as part of a report to management, or as an internal quality control structure.

To apply the SOUL Record, a user is required to go on a one day training course at the maximum cost of £150 per person. This price includes a copy of the SOUL Record to use with clients, a User Guide, a CD containing a PDF file of the SOUL Record and User Guide and the Spreadsheet Results Package, venue hire, lunch and refreshments for the day. The SOUL Trainer course runs for 2 – 3 days at the maximum cost of £1,000 per person (£2,000 for private trainers) with

everything you need to be able to train users in the use of the SOUL Record included. A trainers licence lasts for two years and a trainer may access copies of the SOUL Record for training participants at £75 per person, or just the CD for small voluntary organisations (as detailed in the training licence) for £25 per person.

## 6. Other Systems

This article contains information on four major soft outcome measurement systems in the present marketplace. Other systems are in use with details of each identified tool briefly listed below.

### 6.1 Catching Confidence

The *'Catching Confidence'* toolkit was developed and launched by NIACE (National Institute of Adult Continuing Education) as a result of a report published in September 2004. The report discussed the

*"findings of a small-scale action research study conducted to carry out qualitative research into learners' and practitioners' views on the development of confidence in relation to learning"* (NIACE, no date).

The original version had 10 positive statements and a grid regarding different areas where confidence may have been improved such as 'at home' or 'at work'. Stickers from a selection of four are stuck in corresponding areas to show how confident a person felt in each environment.

### 6.2 Clinical Outcomes in Routine Evaluation (CORE)

The *'Clinical Outcomes in Routine Evaluation (CORE)'* is

*"a 34-item questionnaire designed to measure a pan-theoretical 'core' of clients' global distress, including subjective well-being, commonly experienced problems or symptoms, and life/social functioning"* (CORE IMS, no date).

The model also contains items about risk to

self and others to help assist with risk assessments across the NHS and other sectors. After going through the questions, a 'global level of distress' is articulated as an average mean which is then comparable to clinical thresholds prior to and on completion of therapy to identify change.

### 6.3 Formula One

*'Formula One'* was developed focussing on Neighbourhood Learning Centres. Client progress is tracked using a representation of a Formula One racing track. Clients discuss their aspirations with a development worker, which equates to a taster session, or 'practice' lap. A personal action plan (race strategy) is combined with evidential reviews, or 'pit stops'. Once the 'race' is over and the 'finishing flag' has been passed, there is a 'post race debriefing' or exit strategy. An example of a reward would be a certificate of achievement.

### 6.4 Kirklees Common Ground 'Soft Outcomes Measurement Toolkit'

*'Kirklees Common Ground 'Soft Outcomes Measurement Toolkit'* is a CD-ROM based tool for measuring 'distance travelled' by Common Ground beneficiaries in West Yorkshire. The tool was available from Kirklees Metropolitan Council since February 2006.

### 6.5 The Personal Power Pack

*'The Personal Power Pack'* was developed by Gloucestershire County Council Adult and Continuing Education and Training Services (ACET) and consists of a collection of documents to allow tutors, teachers and support workers to measure soft skills progression. Aimed at students 16 and over, the model may be used as a stand alone or in groups to facilitate discussion. Details of the system are limited.

### 6.6 Rosenberg Self-esteem Scale (SES)

The 'Rosenberg Self-esteem Scale (SES)' is a "10-item self-report measure of global self-esteem" (European Monitoring Centre for Drugs and Drug Addiction, 2006).

The scale has 10 statements which are related to feelings such as self-worth or self-

acceptance. Responses are given on a four point Likert scale ranging from ‘Strongly agree’ to ‘Strongly disagree’. The SES may be completed as a stand alone document or as an interview process and was initially designed for use by children and young people in 1965. Scores are achieved by calculating ratings assigned to all items and reverse scoring positively worded statements. The higher the score is indicates a higher level of self-esteem. Rosenberg’s SES is available in the public domain.

**6.7 Warwick-Edinburgh Mental Well-being Scale (WEMWBS)**

The ‘*Warwick-Edinburgh Mental Well-being Scale (WEMWBS)*’ was jointly developed and launched in 2006 by University of Warwick and University of Edinburgh. WEMWBS is used by NHS Health Scotland for assessing positive mental health. It consists of 14 positively worded statements with a scoring scale going from 1 ‘None of the time’ to 5 ‘All of the time’. Areas of mental well-being such as ‘positive thoughts’ and ‘feelings’ are covered including

*“both hedonic and eudaimonic*

*perspectives”* (NHS Health Scotland, 2006).

**7. Summary / Conclusion**

A comparison of the key features and costs of each system has been presented in Table 1.

Each system mentioned within this article and others not identified here will inevitably have positives and negatives over other systems. The importance of picking the right soft outcome measurement tool for the particular organisation is the key to its success. It is important to think not only about cost, but what you require to measure, which legislation the organisation needs to measure against and which system is most appropriate for both staff members and clients to use.

For more information on the content of this article, please contact Clayton Anderson at The Research Centre, City College Norwich by telephone (01603) 773464, e-mail [CANDERSO@ccn.ac.uk](mailto:CANDERSO@ccn.ac.uk), or via The Research Centre website at [www.theresearchcentre.co.uk](http://www.theresearchcentre.co.uk)

Table 1. Comparison of system features and prices

System	Features					Cost Per Person		
	Measures against Every Child Matters	RARPA Compliant	IT System available?	Flexible	Adaptation available?	£0	£1 - £150	£151 +
Outcomes Star			✓		✓	✓		
SpiritLevel			✓				✓	
Rickter Scale			✓	✓	✓			✓
The SOUL Record	✓	✓	✓	✓	✓		✓	
Clinical Outcomes in Routine Evaluation (CORE)						✓		
Formula One						✓		
Kirlees Common Ground 'Soft Outcomes Measurement Toolkit			✓				✓	
The Personal Power Pack				✓			✓*	
Rosenberg Self-esteem Scale						✓		
Warwick-Edinburgh Mental Well-being Scale						✓		

\* Current prices not available. Most recent price acquired in 2006 when training was on average priced at £50-100 per head per day for those in the voluntary sector and products (i.e. work packs or software) varied between £15 to £100 each.

## References

- Butcher, B., Marsden, L. (2004). Measuring Soft Outcomes: A Review of the Literature. *The Research and Development Bulletin*, 2 (3): 31-36.
- CORE IMS (no date). CORE Tools > Outcome Measure :: CORE IMS :: Service & Support for Psychological Therapies & Counselling using CORE System, [http://www.coreims.co.uk/index.php?name=EZCMS&menu=201&page\\_id=8](http://www.coreims.co.uk/index.php?name=EZCMS&menu=201&page_id=8) [accessed 24/10/07]
- Dewson, S., Eccles, J., Tackey, N.D., Jackson, A. (2000). *Guide to Measuring Soft Outcomes and Distance Travelled*. The Institute for Employment Studies, Brighton
- European Monitoring Centre for Drugs and Drug Addiction (2006). Rosenberg Self-Esteem Scale (SES), <http://eib.emcdda.europa.eu/index.cfm?fuseaction=public.Content&nNodeID=3676> [accessed 24/10/07]
- Fairbridge (no date). SpiritLevel, <http://www.fairbridge.org.uk/spiritlevel> [accessed 22/10/07]
- NHS Health Scotland (2006). The Warwick-Edinburgh Mental Well-being Scale (WEMWBS), <http://www.healthscotland.com/documents/1467.aspx> [accessed 24/10/07]
- NIACE (no date). Catching Confidence, <http://niace.rcthosting.com/en/newsdetail.asp?Section=4&Ref=894> [accessed 25/10/07]
- The Rickter Company (no date). The Rickter Scale, <http://www.rickterscale.com/01.htm> [accessed 22/10/07]
- The SOUL Record (2006). Have you got SOUL? <http://www.theresearchcentre.co.uk/soul/publications.htm> [accessed 24/10/07]
- Triangle Consulting (2006). What is the Outcomes Star? <http://www.homelessoutcomes.org.uk/page1688490.aspx> [accessed 21/10/07]
- Triangle Consulting (2007a). The development of the Outcomes Star, <http://www.homelessoutcomes.org.uk/page16863616.aspx> [accessed 21/10/07]
- Triangle Consulting (2007b). The Outcomes Star, [http://homepage.ntlworld.com/katepeter/triangle/outcomes\\_star.htm](http://homepage.ntlworld.com/katepeter/triangle/outcomes_star.htm) [accessed 21/10/07]