

Handy Hints

Monitoring

Introduction

Most organisations will keep records for funding applications and internal records. This guidance is intended to introduce the principles behind monitoring and why it is beneficial and increasingly requested by both statutory bodies and charitable trusts and foundations. The focus of this guide is for awarded Age Concern England projects.

Monitoring (and Evaluation) does not have to be time consuming. It can be done on just one element or the whole of your project. More importantly, it's not just a paper exercise. It should tell you where you are going wrong (as well as what's working well), and guide you on the steps you can take to improve things.

Why monitor and (evaluate) a project?

- to measure the quality of work being carried out within your organisation.
- to identify the impact that staff and volunteers in particular have on your organisation, both in terms of their contribution and their economic value.
- to identify areas in your project that may need improvement.
- to demonstrate the effectiveness and success of the project.
- funders may require you to monitor and evaluate your project.

What is monitoring?

Monitoring is the process of collecting information on the work that takes place within your organisation, so that your processes and procedures can be updated and reviewed as necessary. Information can be collected daily, weekly, monthly or quarterly.

Contents

- **What is an outcome?**
- **Inputs and Outputs.**
- **Outcomes as listed in Age Concern England application forms.**
- **Monitoring requirements of Age Concern England projects.**
- **Ways of monitoring projects.**
- **Further reading and reference materials.**

What is an outcome?

Put simply, an Outcome is the change that your project will make to both your organisation and users. For example, in installing a hearing loop for older deafened users, the outcomes could be:

- Increased participation by older people in community life.
- Decreased social isolation of older people.
- Increase in confidence of older people through improved communication.

Inputs and Outputs

What is an input?

An Input is something that will be used or an item that will help deliver a project. This could be the employment of staff, the production of leaflets or the purchase of equipment, such as table and chairs. An input is not the change but how will you go about achieving it.

What is an output?

An output is something that will be delivered by the project. So, where staff have been employed as an 'input', they may now set up and run activity classes and painting sessions as the 'output'. An output is often created or established as a result of the inputs.

Example 1

A very basic way of looking at this process could be :

Input

- Bag of coal

Output

- Roaring fire

Outcome

- Warm and comfortable older people secure in their own home.

(Please note that this is just an example to show the process and is not a project that we would actually fund).

Example 2

Healthy Feet project - To provide chiropody sessions for vulnerable older people. There is a more realistic project based upon the above process.

Input

- Fees for trained foot care specialist.

Output

- Weekly sessions held at local Age Concern.
- Production of flyers publicising sessions.

Outcomes

- Improved health of older people through improved mobility and participation.
- Improved confidence and inclusion by older people in social activities.
- Reduced trips and falls as a result of service promoting independence of older people in their own homes.

How to present your Outcome information?

This is no set format, but it can often be useful at the start and during the project to discuss this with users, management and staff.

Registering and recording the outcome

In trying to establish and demonstrate that you have achieved the Outcome, you may want to use and record a range of information and statistics. Information and statistics for this project could for example be provided through links with the local NHS/ Primary Care Trust who may have figures on the reduced number of trips and falls in the area.

Outcomes as listed in Age Concern England application forms.

Below we have completed the fields as a guide to filling in the relevant section of the application form.

Activity One

Installation of toilet for Disabled Users

Expected Outcome and Date of completion

Outcomes

- Improved facilities at hall resulting in increased participation by older people.
- Reduced isolation of older people through regular activities now held at hall due to improved facilities.

Date of completion – 6 months from start of grant.

Activity Two

Purchase of table and chairs.

Expected Outcome and Date of completion

Outcomes

- Improved facilities at hall resulting in increased participation by older people.
- Older people are better able to voice their opinions on a range of subjects through increased usage of hall.

Date of completion – Purchase of table and chairs after 1 month, benefits are on-going

Activity Three

Provision of chiropody service for isolated older people.

Expected Outcome and Date of completion

Outcomes

- Improved health of older people through improved mobility and participation.
- Improved confidence and inclusion by older people in social activities.
- Reduced trips and falls as a result of service promoting independence of older people in their own homes.

Date of completion – setting up scheme after 2 months, completion of service after 1 year with on-going quarterly review meetings.

Monitoring

To match what you have said in the application form we will need you to report back at the end of your reporting period. As part of the monitoring requirements that you will have agreed to as part of the condition of the grant, you will need to complete a Progress Report. The Progress Report will detail what the project has achieved.

Ways of monitoring projects.

This can be done very rigorously through a series of weekly or monthly sessions between a staff member and the client, completing questionnaires etc. For some projects that is good and will show very strong outcomes. For some smaller projects, such an Outcome monitoring system could be overly complicated, bureaucratic and time consuming. There is no one right way to monitor the changes of any project.

Here are 2 suggestions.

Traffic light system, or colour coding.

Traffic light system could be used to show 'mood', for those with mental health issues. At the start of such a project you would ask each individual/ beneficiary to state which colour best represents them. Red would be in a 'poor' condition, amber would be 'average' and green would 'good'.

During or at the end of the project the same exercise would be conducted and hopefully a clear improvement can be demonstrated.

Linear system

This is a very good way which can easily demonstrate the change and the benefit for older people.

_1_2_3_4_5_6_7_8_9_10_

At the start of the project you would ask the individual to mark on the above line, whether they feel, for example, isolated?

A 5 has been scored above.

_1_2_3_4_5_6_7_8_9_10_

During or at the end of the project the same exercise could be conducted and hopefully a clear improvement can be demonstrated, as indicated by the 8 as listed above. The same 'scoring' along a line system can be done by replacing numbers with colours, possible dark to light.

There are many different system that can be used and it is up to yourselves to decide upon the most appropriate. Possibly the most important thing is to pick whichever system is best for your organisation and for your users' needs.

Further Reading and Reference Materials

This guide is focused at smaller projects, for large projects there are many other organisations that go into greater detail. Below are a number of documents that may be of benefit, some may not be of direct comparison to your project, but will explain different aspects considered in the overall process. Please note that Age Concern England does not monitor these and has no control over there content.

Rights Net – *'A Practical Guide to Outcomes Advice'*.

Community Fund- *'Your Project and its' Outcomes'*.

Change for Children – *'Improving Outcomes for All – A toolkit for Practitioners'*.

Welsh European Funding Office - *'A practical Guide to Measuring Soft Outcomes and Distances Travelled'*.

The Scottish Centre for Regeneration – *'Regeneration Outcomes'*.

For further information please contact your local Age Concern or

The Grants Unit,
Age Concern England
Astral House.

1268 London Road
London SW16 4ER

Tel:020 8765 7738 Fax: 020 8679 9154

Email: grants.unit@ace.org.uk

Web www.ageconcern.org.uk