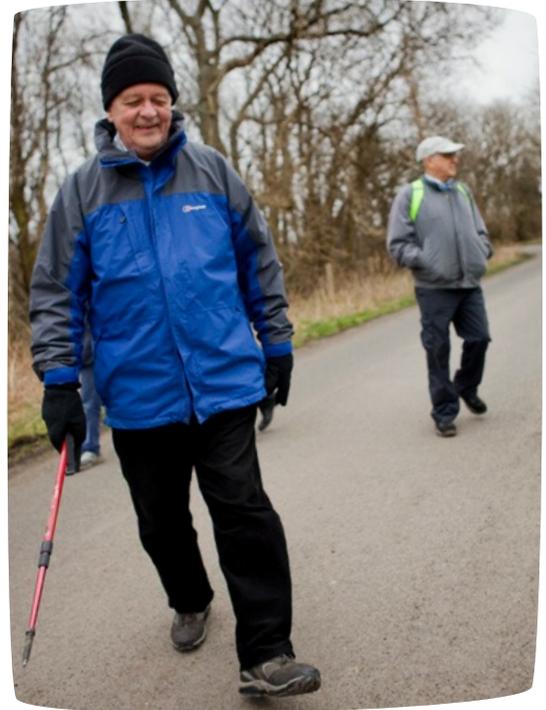


Guidance Note

4 Monitoring & Evaluation

paths
for all





Introduction to Monitoring and Evaluation

Coordinating a health walk project means managing many things at the same time. It is important that you gather information and evidence throughout all stages of your project and use this to assess the work you are doing. This helps you to:

- learn from your work;
- deliver the best possible service; and
- report back to your partners and funders;

This process is called monitoring and evaluation.

Paths for All asks for a project review every six months as part of the conditions of your funding. At the end of your funded period, we ask you to complete a final report. One reason for this is to give our projects the opportunity to review their own work, as well as reporting information back to us. In turn, Paths for All reports to the Scottish Government, and so it is in our collective interests to monitor and report on our work. Keeping walking for health high up on the Government's agenda relies on us working together.

This guidance document starts by clarifying some common terms used in monitoring and evaluation. It then works through each section of the six month project review.

Paths for All acknowledges the support of Evaluation Support Scotland (ESS) during the review of our monitoring, evaluation and reporting systems. The ESS website has some useful resources that walking for health schemes may find useful www.evaluationsupportscotland.org.uk.

Throughout this document we have used a fictional scheme called Big Steps to illustrate our points. Here is their logo.





Some common terms and descriptions.

When you applied for funding from Paths for All you submitted a project plan in the application form. This project plan may have made reference to **aims**, **outcomes** and **activities**. What we mean by these terms is:

Your **aims** state the broad long-term impact you want to have on the lives of the people your project works with.

Your **outcomes** are the changes or differences that your project makes in the lives of the people you target. They are not the activities your project provides, they are the results of these activities. An easy way to think about outcomes is that they come out of your work.

Your **activities** (or outputs) are the services you provide to help make changes in people's lives and achieve your overall aim. Each of your outcomes should be supported by your activities.

Evaluation Support Scotland (ESS) has produced a range of support guides that can be downloaded from their website

www.evaluationsupportscotland.org.uk

ESS Support Guide 1: Setting Outcomes is a basic introduction to outcomes. It links your services and activities to your outcomes.

The six month project review

Paths for All has always asked for an annual report from funded schemes. An assessment of our own work led us to design a new project review template, so that all schemes are answering the same questions. This six month project review applies to all grants.

The project review is due every six months and has six sections for you to complete. The project review relies on you collecting information as you go along (monitoring) and then reviewing it at the end of the six months evaluating. It is an ongoing process.



Example

Big Steps walking project **aims** to improve the health and wellbeing of inactive women in Balduie.

Big Steps has three **outcomes**:

1. Inactive women in Balduie become more physically active.
2. Walkers have increased social networks.
3. Walkers have improved physical and mental wellbeing from walking more.

Activities: In the past six months, Big Steps has:

- run 24 local walks;
- met with health professionals in the area to tell them about their walks;
- offered a volunteer Walk Leader training course;
- put up a notice board in the community hall listing the range of activity groups and classes in Balduie; and
- held a bring and share lunch to attract new walkers.

Section 1: Your project plan

The aim of this section is:

- to summarise your project aim(s);
- to recap on the differences or changes you planned to make in the lives of the people you work with (your outcomes); and
- to summarise the activities and services you planned to offer in the last six months that would help you make these changes happen.



Example

Jacqui had seen posters about the walks around the village but didn't think these walks were for her as she wasn't feeling very fit. It was only when her diabetic nurse told her more about the walks that she decided to give them a try. The nurse explained how some of her patients were really enjoying taking part.

Jacqui started walking six months ago and now comes along every week. She has already started to feel the benefits to her health.

"I am less breathless when walking up to the Post Office at the top of the hill"

Regular walking has also helped Jacqui's wellbeing and relationships.

Section 2: Facts and figures

This is where you give information about your volunteers, new walkers and walks over the last six month period. The PFA Walkers Database will help you with this. Please also give details of any other activities or services that you provided over the past six months.

We have updated and improved the Walkers Database (formerly the Led Walk Database).

All you have to do is ask your new walkers to complete a New Walker Form. Return completed forms to us in the stamped, addressed envelopes provided or scan completed forms and email them to info@pathsforall.org.uk. Paths for All will enter the information into the database for you.

You will have access to this data from your own computer. After six months, we will contact each new walker who provided an email address with a follow-up physical activity survey.

It is possible to use the names and addresses of your walkers for mail merging. This is a new (and much requested) feature of the database. It will hopefully help streamline some of your administration processes.

You can enter your own walk register details into the Walker Database. This will give you a report on the number of led walks your project has delivered and how many walkers attended. Many projects have found this useful when reporting to partners and funders. Paths for All is unable to enter this data for you.

You can record which walkers are Walk Leaders by ticking Volunteer Walk Leader on the Walker's Details page in the Walkers Database.

Use of the Walkers Database is not restricted to projects that we fund. Any Walking for Health project can use this database and we will still enter your data and do your follow ups.

Paths for All encourages all Health Walk groups to use the New Walker Forms and database.

For help and advice on using the Walkers Database, please contact the Corporate Services team on 01259 218888 or info@pathsforall.org.uk

Section 3: Evidence

This section of the review allows you to provide supporting evidence to help show the difference your project has made. We are particularly interested in the evidence on your outcomes and the activities you have delivered. This can include:

- case studies / walkers stories;
- written evidence including quotations, letters, emails, walking diaries, etc. ; and
- press articles and photographs.

Collecting case studies

Paths for All has some example case studies on our website as [Walkers' Stories](#). There are some examples on our [YouTube](#) webpage that might inspire you to interview some of your walkers on camera.

It is good practice and will make your reporting easier if you regularly collect information from your walks throughout the year. Feedback can be from walkers, Walk Leaders, partners, funders, or anybody who is connected to your walking project.

The Stirling Walking Network produced a [Walking Researcher's Toolkit](#) some years ago. This is a great resource. Tricia Cumming, who coordinates the network, has given us permission to use this toolkit and share it with other projects.

Some questions you could ask to help you collect evidence for a case study are:

- How did you hear about the walking for health scheme?
- Why did you decide to take part?
- Have you noticed any benefits from walking regularly? e.g. physical health, mental health, wellbeing, social health, relationships, or any other benefits.
- What do you enjoy about being part of the walking group?
- What do you find difficult about being part of the walking group?
- What benefits do you hope to gain in the future?
- Do you have any suggestions about things that could be done better in the walking group?
- Why do you come along?



Evaluation Support Scotland has produced a helpful guide called [ESS Support Guide 3.2 - Writing Case Studies](#).

Other evidence, like press articles and photos, can complement your facts and figures and give a good insight into your work. Press articles can be photocopied or scanned and saved in a file. A library of photographs taken on walks, at training events, or at other volunteer events, such as away days, can help build up an evidence base. You could even take a short video or sound bite about your project using a smart phone.

As with all data collection, please spend some time working through your Data Protection systems.

If you collect case stories, or use other written material or photographs that identifies an individual, you need to seek the permission of the people involved.

By ticking the box on the review form, you are giving Paths for All permission to use this evidence and confirm that you have gone through the proper Data Protection procedures. This secures permission from identifiable individuals to give the details contained in this section to Paths for All.



Section 4: Learning and your plans for the future

Sections 1-3 asked you to check whether what you currently deliver through your project is in line with your original project delivery plans. Section 4 asks you to think about how you can use this information to learn and improve.

It's useful to take time to look back over your project delivery and recognise which aspects of the project worked well and why. Identifying what you did that made your project a success will help inform what you do in future to achieve similar success.

It is equally helpful to your forward planning to identify

- which parts of your plan didn't go so well;
- why these things didn't go well; and
- any changes you made as a result.

There are often very good reasons for making changes to your delivery. Section 4 can be a good place to tell us about unexpected outcomes. Have you been surprised by anything that happened? Whether positive or negative, this can be a good source of learning for your project and for Paths for All.

Example



The Big Steps project had planned to start up regular walks for patients at a local hospital. Despite frequent visits from the Project Coordinator and external Walk Leader volunteers, the walks failed to get going. They lacked the support of key staff for whom the walks were not a high priority, or who could not find the capacity in the roles to get involved. Some patients' conditions were too acute for them to walk more than 100 meters. For other patients, their stay in hospital was too short to make attending the walks useful.

With this information, Big Steps was able to review and amend their plan to launch a walk for patients at the hospital. They decided it was not feasible to roll out Health Walks at the hospital at this point in their project. They decided to work with key staff first to work out how walking might be prioritized. One thing they plan to do is to raise awareness of the benefits of walking with hospital staff and patients.



Section 5: Moving on from health walks

We would like to know if any of your walkers have moved on to take part in other activities because they have become fitter. Please tell us what other activities your walkers do as follow on activities, if you know this.

As the people attending your walks start to get fitter, they usually want to walk further and faster. This is great news as it shows that their fitness is improving. This increase in fitness is often accompanied by an improvement in all round health. As a Health Walk group, it's important to continue to target people who are inactive to start coming along on the walks. In other words, if people want to walk for more than an hour and at a faster pace than a Health Walk, it's time for them to leave the Health Walk group and move on to other activities. They could start up an independent next steps group, join another group that does longer walks, such as Ramblers or consider being active in other ways, e.g. fitness classes or other sports.

Feedback from walking projects has let us know that some new walkers may be reluctant to join a Health Walk because they feel that they can't keep up with the group or that they would hold other walkers back. In fact, these are exactly the type of people who should be encouraged to attend the walks. Walks should be adapted to match their abilities.

It may be that your project also offers more challenging activities that your walkers could go on to do. Alternatively, you could suggest some local classes like swimming, keep fit, tai chi or that they meet up independently to continue to walk. You could possibly work with local partners who could give a talk to this group of people to let them know more about the type of activities which are on offer locally, e.g. leisure centre or Community Sports Hub.

The Path for All Refresher Walk Leader course has a section on progression activities. If your Walk Leaders were trained more than two years ago, then it may be time to book them onto a Refresher course. You can find out more information about these courses from your [Paths for All Development Officer](#).

Example

Big Steps started some longer walks called Even Bigger Steps. This was in response to a request from many of their walkers who wanted to go for slightly longer and brisker walks. This programme of longer walks sits alongside the Big Steps Health Walks in their marketing materials and provides a great way for walkers to see the progression pathways.



Not all walkers want to go on longer walks, but the project coordinator is happy to have this opportunity to offer her walkers.

Section 6: your budget

When you filled out your grant application to Paths for All, you included a budget of expected income and estimated expenditure for the life of your project. In your six monthly reports to us, we would like to see how your actual income and expenditure compare with what you budgeted. We have included a template for you to follow. However, if you prefer to use another format then essential items to include in the financial report are:

- name of the project or scheme;
- dates that the budget report covers (usually six months);
- original budget figures that you set for income and expenditure;
- actual amounts received and spent - this is for the whole project (not just the Paths for All grant);
- differences (or variances) between budgeted and actual figures;
- explanations of why the differences occurred (see the footers in the following example); and
- at the end of each financial year, please send us your annual accounts.

A budget is a best estimate and a guide. Life usually turns out a little differently in reality. There is nothing wrong with having actual figures that are different from initial budgets if you know why they are different and you use that knowledge to make any changes needed to support your project aims and outcomes.

In our example, Big Steps income was as budgeted for the six-month period. The Coordinator's start date was a month later than initially budgeted for and as a result some expenses are lower than the budget over the six months. Walk Leader training will take place in the next six monthly reporting period. No other changes need to be made due to the financial position.

Example

Here is a sample financial report from the Big Steps walking scheme.

Big Steps Financial Report		1 April 2011 – 30 Sept 2011	
	Budgeted £	Actual £	Variance £
Income			
Paths for All	2,700	2,700	0
Local NHS Health Improvement Budget	3,500	3,500	0
Balduie Community Council	756	756	0
Total income	6,956	6,956	0
Expenditure			
	Budgeted £	Actual £	Variance £
Salaries	5,256	4,380 ¹	-876
Recruitment	350	410 ²	+ 60
Staff & volunteer travel expenses	120	80 ³	- 40
Marketing	150	115 ⁴	- 35
Training	500	0 ⁵	-500
Volunteer Support	150	65 ⁶	- 85
Phone	250	190 ⁷	- 60
Stationery	130	130	0
Evaluation	50	50	0
Total expenditure	6,956	5,420	-1,536

- 1 Co-ordinator started one month later than expected therefore salary costs are down one month
 2 Candidates came from wider geographical area than expected and travel expenses were larger
 3 Travel expenses lower due to later start date of Co-ordinator
 4 As above
 5 Walk Leader training postponed to next reporting period
 6 As footnote 3
 7 As above





Conclusion

The new reporting format is designed to be straightforward to complete, as well as informative and useful for local walking schemes and Paths for All. Many of the changes to our reporting were due to feedback we received from Project Coordinators. We have tried to incorporate these changes into the six month project review document and hope that this Guidance Note will make reporting to Paths for All easier and less time consuming. Thanks very much for all your hard work.

Useful Links

www.evaluationsupportscotland.org.uk

www.pathsforall.org.uk/pfa/support/monitoring-a-evaluation.html

There are 8 Paths For All Guidance Notes in this series:

1. The Case For Walking
2. Planning Your Project
3. Working With Volunteers
4. Monitoring & Evaluation
5. Marketing & Promotion
6. Moving On
7. Recruitment
8. Using Text Messages to Motivate Walkers



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Paths for All Partnership is a recognised Scottish Charity No: SC025535 and a Company Limited by Guarantee No: 168554 incorporated 19 September 1996 at Companies House, Edinburgh. Registered Office: Office 8, Forrester Lodge, Tullibody Road, Alloa FK10 2HU.

