

Evaluation Method: Using case records

Overview

We collect information for lots of reasons.

You may already use forms to collect information about referrals, needs, attendance, ongoing work, feedback.

You may be able to tweak those forms to collect outcome information.

What's required

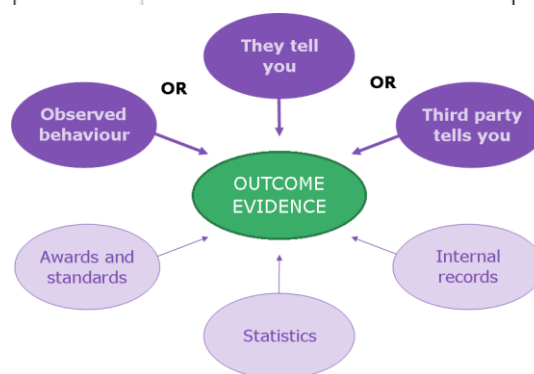
Map the information that you are collecting at different points, then ask if you are or could make those forms more outcomes focused. (See overleaf).

For example, could you ask referrers to be clear about the outcomes that matter for that person? In assessing needs could you take a baseline against outcomes? In your case notes could you link progress to your projects' or personal outcomes?

Case Management Progress Note		Name _____
		ID Number _____
		Date _____
		Units _____
Need(s) Addressed	_____	

Summary of Actions	_____	

Result(s) of Action Steps	_____	



Process

Introduce an outcome question and/or use your outcome indicators to develop a tick-box that is built into your forms or case notes recording system.

Capturing evidence

You can use a tick box for when you feel you have evidence of change or the information is relevant to outcomes. You can also capture the things people say (keep the client's own words if possible), this will be useful for lifting quotes/writing case studies.

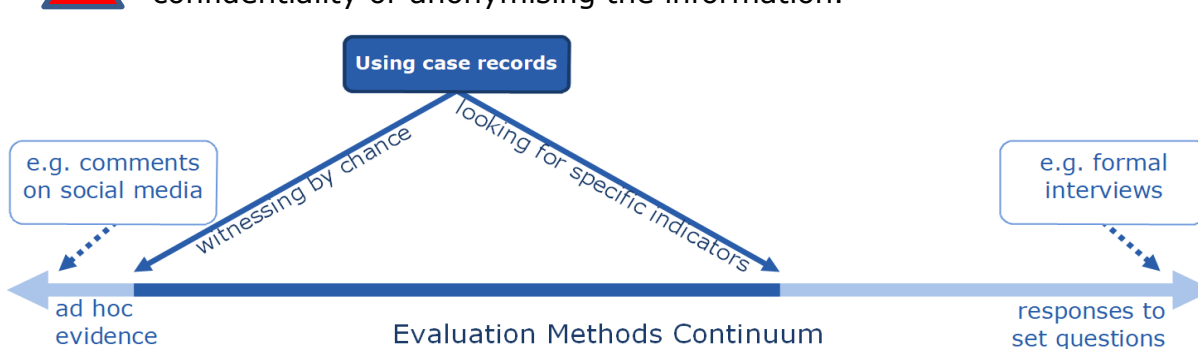
Useful for

Organisations who already have to make a detailed record of what they are doing, for example, advice agencies, or those offering more in-depth support.

Getting a lot of detailed information about a client's journey over a long period of time.



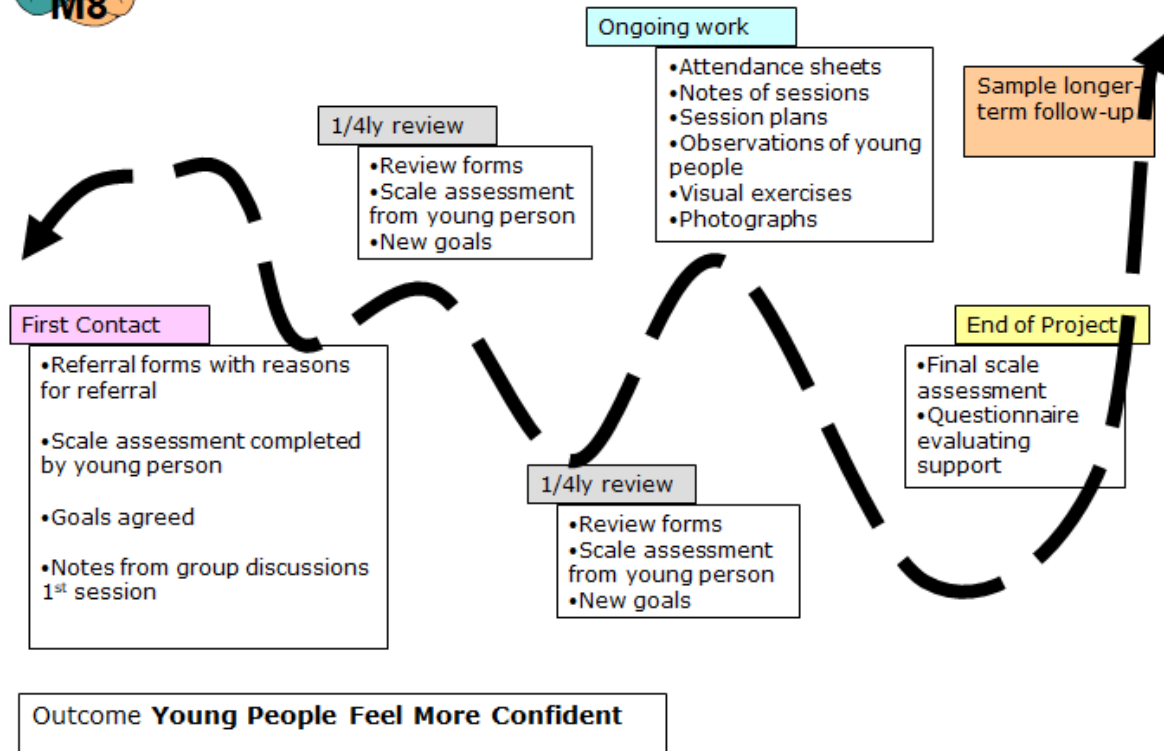
Warning: when it comes to reporting you'll need to think about confidentiality or anonymising the information.



Example of mapping from a youth work project



Mapping the Journey



Example form from an advice project

Date: 14/6/18					
Case note:					
Davey came in to the office today – he said his “money’s been stopped”. He was able to say which benefit it was (ESA) and had brought in a recent entitlement letter.					
Called Job Centre and they confirmed there had been an error with his payments and would be able to make a same-day payment to his account by this afternoon. He said when he was leaving “that’s great I know I’ll be able to pick something up for my tea now”					
Evidence of:		How much?			
		None	A bit	A lot	Fully
Understanding of entitlements?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ability to organise finances?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Level of stress?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>