

# Monitoring progress



**Unit:** Planning exercise referral programmes with patients

## TASK: consider the following

*Why is it important to monitor and review progress?*

*What needs to be monitored?*

# Importance of reviewing

A source of data and records

## **Scheme**

- Monitoring and evaluation
- Effectiveness
- Continued provision of scheme (commissioning)
- Targets agreed with commissioning services

## **Client**

- Progress and achievements
- Motivation and feedback
- Integration of activity into daily life, e.g. Moving more often
- Alternatives if client is unable to attend, e.g. Walk

## TASK: consider the following

*What methods can be used to review progress?*

*When would you review progress?*

# How and when?

Set intervals, check:

- EQ5D – quality of life
- IPAQ – activity levels
- BMI
- Blood pressure/heart rate
- Other assessments, e.g. observation
- Attendance registers

For example;

- Postal questionnaires
- Telephone interviews

To monitor:

- Sustained changes
- Changes in circumstances



At each session, check:

- Changes in condition/symptoms
- Reasons to defer or signpost back to GP
- If any changes to programme needed, e.g. revise goals

# Other monitoring tools/techniques

- Attendance registers - adherence and changes in activity levels
- Pedometers - changes in activity patterns
- Client goals reviewed - achievement and progress
- Physical assessments - changes BMI, blood pressure, flexibility etc
- Programme cards - progression and regression
- Psychological assessments – quality of life and well-being
- Medical records – changes to condition and/or medication
- Diaries and logs - lifestyle changes

## TASK: consider the following

*How would you provide feedback to clients after a review?*

*How could you encourage clients to share their own views?*

# Providing feedback to clients

- Face to face
- Positive and affirming, e.g. use positive language
- Constructive and specific, e.g. telling them exactly what they do well and the progress they are making
- Appropriately timed, e.g. immediate or as close to an event/action as possible.
- Genuine and honest, e.g. to reflect something they have done or achieved.
- Respectful, e.g. not critical or negative
- Avoid evaluative language, e.g. Poor
- Relevant, e.g. link with goals and objectives



# Encouraging clients to share their views

## How?

- Ask open questions – verbal
- Listen
- Questionnaires

## Why?

- Engagement
- Responsibility
- Equal partnership
- Another source of data



## TASK: consider the following

*When writing a letter to a health care professional, what may you need to consider and include in the letter?*

# Writing a letter to a healthcare professional

The following information should be provided:

- The address of the referral service
- The address of the recipient of the letter on the left hand side
- The date - underneath the recipient's address, either on the right or left hand side (write the month as a word, e.g. January)
- Greeting (Dear Dr Smith or Sir/Madam, if you do not know their surname)
- The purpose of the letter outlined in the first paragraph
- Concise and accurate content
- Ending
  - Yours Sincerely if you know the name of the GP
  - Yours Faithfully, if you do not know the name of the GP
- Signature with name printed below the signature

# TASK

*Write an example letter to a GP*

*Choose an appropriate reason for contact, e.g. Change of symptoms, exit, drop-out etc*

*You may choose to contextualise to any medical condition.*