

USING TOOLS TO TRACK AND REPORT PROGRESS

Session Objectives

By the end of this session, the participants will be able to:

1. Describe how to track progress using the discussion tool, the follow-up sheet, the consolidated sheet, and the bar graph correctly (*only* if so required by the program manager/organization).

SESSION AT A GLANCE: Tracking Progress

Activity	Time	Materials
<p>A. Introduction</p> <p>Trainer introduces the topic: tracking progress using the discussion tool and the other forms, and presents the session's one objective.</p> <p>Reviews organization policy with regard to keeping records.</p>	5 minutes	<ul style="list-style-type: none"> - Flipchart, markers, tape - Discussion tools for WASH as posters and handouts
<p>B. Climate Setter</p> <p>The trainer reviews Module 5, Session 2 where the discussion tools were introduced.</p>	5 minutes	<ul style="list-style-type: none"> - Flipchart paper, markers, tape - Copies of the discussion tools
<p>C. Large Group Demonstration</p> <p>The trainer presents the forms and explains how numbers are transferred from the discussion tool to the follow-up sheet, to the consolidated sheet, and finally to the bar graph (if appropriate).</p>	15 minutes	<ul style="list-style-type: none"> - Poster-size discussion tool forms - Large copies of tracking sheets, etc.
<p>D. Table Task</p> <p>Participants, with some of the diagnostic tools filled in, try their hand at transferring numbers. Tables consolidate their numbers using the sheets, if appropriate.</p>	45 minutes	<ul style="list-style-type: none"> - Copies of the tools for each table (fill some in with X's and O's to be used as examples)
<p>E. Review</p>	5 minutes	<ul style="list-style-type: none"> - Prepared flipchart of key points from the session



75 minutes (if Activity D included)

PREPARING TO TEACH THIS SESSION: Tracking Progress

Before you present Module 7, Session 1:

1. Have copies of the relevant forms ready (discussion tools and follow-up sheet, and also, if needed, consolidated follow-up sheet and bar graph). These are in the *Collection of Resource Materials* in the data management section and discussion tools section, and in the *Outreach Worker's Handbook* pp. 32–49 and 55–64.
2. If possible, have large format copies of the forms ready for demonstration.
3. Prepare a flipchart page with summary of key points.
4. Review organizational policy on the outreach worker's role in collecting and recording data other than for tracking progress with community audiences.
5. Optional: If the organization wishes to monitor progress using more than the individual discussion tools, the participants can practice using the follow-up sheet, consolidated follow-up sheet, and bar graph. In order to practice using these forms, discussion tools with make-believe data will need to be supplied.

TRAINING ACTIVITIES: Tracking Progress

A. Introduction to the Session (5 minutes)

1. Welcome the participants to this session on using the discussion tools and other forms for tracking progress via data management.
2. Say that during this session they are going to see how to track their target audience's progress using the discussion tools and some of the other forms. Review the organization's policy regarding monitoring responsibilities of the outreach worker.



Trainer Note:

It is suggested that the outreach worker use the discussion tools to keep track of progress made by their audiences. The use of the other forms for consolidating data is determined by the organization.

3. Present the session's objective: how to track progress using the discussion tools and the other monitoring form(s).

B. Climate Setter (5 minutes)

1. Ask why it's important for outreach workers to track their progress with an individual or family or group.



Trainer Note:

Possible answers might include: They help with follow up, help us know that what we are doing is working, help with reporting back to HQ, show progress to the target groups, let target groups know they've progressed, motivate individuals and families, alert families to common problems that may need to be addressed through community action, etc.

2. Take a couple of answers but do not prolong this discussion. It is important to get the participants thinking about monitoring and tracking their efforts.

C. Large Group Demonstration (15 minutes)

1. Introduce the Household Water Assessment Tool (p. 33 of the *Outreach Worker's Handbook*) again in a way that everyone can see or have copies of the cards available at the tables. Also recall their use in previous sessions.
2. Demonstrate (or ask for a volunteer to show) how the tool can be used to track progress with target audiences.



Trainer Note:

Current practices of the audiences can be marked with an "X" and jointly planned practices with an "O." As the outreach worker continues to work with the same target audience, s/he can mark new marks on same copy of the discussion tools with X's and O's, thus recording progress for the target audience to see, remembering that the goal is to achieve the key practice and thus improve health.

3. Discuss any challenges the outreach worker might face and work to address those issues.
4. If the outreach worker will be responsible for more levels of monitoring other than tracking individual or family progress, go to the next exercise.

D. Practice at the Tables (45 minutes)

**Trainer Note:**

Again, the organization and program manager should determine whether or not the outreach worker will be responsible for tracking progress beyond that of the target audience. If this is the case, the workshop can cover the following instructions.

1. Hand out the Family Data Tracking Sheet. Explain that it is used to document the information from the diagnostic tools on which individuals, groups, or families indicate their present behaviors and make their commitments to improve their behaviors. Refer to *Outreach Worker's Handbook* pp. 55–64. This information is also available in the *Collection of Resource Materials*.
2. Hand out the Data Consolidation Sheet (found in *Outreach Worker's Handbook* p. 59). Explain that this sheet enables a person to put the information collected from all households by all the outreach workers in the community onto one sheet. This information is also available in the *Collection of Resource Materials*.
3. Hand out the Bar Graph (found in *Outreach Worker's Handbook* pp. 57 and 60–64). Say that bar graphs are a good way to inform community members how they are progressing. Bar graphs take the information from the consolidation sheets and make it easier to understand. They provide a view across the community. This information is also available in the *Collection of Resource Materials*.
4. If there is time to practice, pass out some of the prefilled in sheets with made-up data and have the participants work at filling out the three tracking tools.
5. Process the exercise by asking about:
 - Challenges to keeping records
 - How to overcome those challenges
 - The utility of the data (who is the information for and how will they use it?)

**Trainer Note:**

Data they will not be using should not be collected.

- E. Drawing Conclusions, Review, and Reading (10 minutes)
1. Show participants where in the *Outreach Worker's Handbook* (pp. 55–64) they can find more information to help them with data collection. Say that if their organization would like them to keep careful records, they can refer to the information in the *Outreach Worker's Handbook*. This information is also available in the *Collection of Resource Materials*.

An alternative to reading is to send the participants to find the answers to some questions you pose about the topic at hand.

2. On p. 76 in the *Outreach Worker's Handbook* have them record what they will do at home to continue the learning process about collecting data. This may also be done orally, with the facilitator recording the responses on a flipchart.
3. If not already done in Module 6, conduct the graduation ceremony, as appropriate. Hand out certificates (see copy in the *Collection of Resource Materials*) or hold a little ceremony and invite any local dignitaries or WASH actors.
4. Optional: pass out workshop evaluation. Sample questions are available in Appendix 4.
5. Review the key summary points:
 - Tracking each outreach worker's progress with individuals and families using the discussion tools is strongly recommended.
 - Organizations will make their own decisions about how far to go with the monitoring process.