



Making Pals

Community led activities for older people in care homes

Project Evaluation – Terms of Reference

1. Background of Project

1.1. Background of Alive!

Since 2009 Alive! has been dedicated to improving the quality of life of older people in care homes through meaningful activities: meeting individual needs and improving well-being.

Alive!'s mission is to put older people's mental health and wellbeing at the heart of care across the UK and works in over 350 care settings to:

- Enrich the lives of older people through a range of meaningful activity sessions
- Share our expertise in creativity and engagement through training and support for care staff
- Reduce older people's social isolation by connecting them to their local communities

Alive!'s offices (and the majority of our staff team) are based in Bristol where we have a strong presence, and active, well-established links with care homes, local authorities, and the academic and voluntary sectors. In 2015, well-being sessions benefited 7,700 older people in 385 care settings (Care Homes and Day Centres) in Bristol, Bath and North-East Somerset, North Somerset, Gloucestershire, South Gloucestershire, Dorset, Hampshire, West Sussex and Wiltshire.

1.2. Background of Making Pals

The Henry Smith Charity (HSC) is funding Alive! to develop a three-year community engagement project for older people living in care settings across Greater Bristol. In order to achieve the greatest impact, we intend to focus on residential care homes in the 'Greater Bristol' area. This is defined as the four unitary authority areas of Bristol, Bath and North-East Somerset, South Gloucestershire and North Somerset.

The project title is 'Making Pals'; it will build on Alive!'s intergenerational projects Paint Pals and iPals that connect CH residents with local school children. 'iPals' uses iPads and Paint Pals uses painting to nurture mutually beneficial relationships.

Making Pals' aim will be to challenge and break down the barriers between care homes and the local community, local businesses, groups and organisations and nurture relationships, so that older people in care (even the frailest) can be part of community life. We wish to pilot a number of community engagement approaches and interventions and share the lessons far and wide. In doing so, we want to achieve the following objectives:

- Change the way in which care homes are perceived, by celebrating excellent practice and promoting positive images that challenge negative stereotypes;
- Encourage care homes (residents, staff and relatives) to see their care community as being an integral part of the local neighbourhood and to develop new ways to engage with it;
- Support the development of meaningful, sustainable relationships between care homes and people/organisations outside the home;

2. Purpose of Evaluation

2.1. Purpose of Evaluation

The purpose of this evaluation is to determine to what extent the Making Pals project achieves its core objectives.

In addition, the evaluation will analyse the effectiveness of the many different interventions that will take place as part of the three-year Making Pals project.

2.2. Key Evaluation Questions

The evaluator will be responsible for monitoring to what extent Making Pals achieves the following core objectives;

- Making Pals will improve the well-being and happiness of care home residents
- Making Pals will improve the well-being and happiness of care home staff

- Making Pals will improve the public's perceptions of care homes
- Making Pals will increase the level of community engagement conducted by care homes
- Making Pals will increase the number of local community groups offering to run activities in care homes

The evaluator will determine;

- What results have been achieved?
- How do the different interventions used within the project compare to each other?
- How do the results compare with alternative interventions outside of the project with the same objectives?
- Which interventions, if any, are the most suitable to replicate in other care homes?
- How could these interventions be made more effective in the future?
- Are the results sustainable?

2.3. Audience for evaluation

The evaluation will primarily be used to report outcomes to the project's funders, used internally to help Alive! deliver more effective projects and to help prove Alive!'s record in delivering tangible outcomes when securing further funding.

Secondary to this, the work will be circulated around organisations and care homes running or planning similar projects to help them understand the most effective approach for them. In addition to this report, a toolkit detailing how to replicate suitable interventions will be produced by the project team and circulated to this group.

Finally, the evaluation report should be accessible and engaging enough to appeal to care home staff and the public. This is in order to encourage grass roots imitations of the project.

3. Conducting the Evaluation

3.1. Evaluation methodology

The planned evaluation methodology is as follows. It has been devised as a draft by the project team. The evaluator's role at the beginning of the project will be to advise and if necessary suggest improvements to the methodology. Throughout the project, the evaluator will ensure quality collection of data and prepare the evaluation report at project closure. **The project team will collect all data, the evaluator will be provided with the information in which to prepare their evaluation.**

3.2. Scope of Evaluation

3.2.1. Planned quantitative evaluation work

To assist the evaluator in assessing the effectiveness of the project the Making Pals team will be monitoring the objectives in the following ways;

- **Making Pals will improve the well-being and happiness of care home residents**

The project team will look to use an existing well-being measurement framework and work with Alive! trainers and adapt it, so it is suitable to be used with persons of all cognitive abilities.

- **Baseline** - Baselines will initially be taken from residents living in 10 care homes who will be working closely with Making Pals in the first six months of the project. After this, each resident who becomes involved in the project will be asked to complete a baselining task and where possible supported by carers, relatives or project staff.
- **Ongoing measurements** - At an interval to be agreed with the evaluator, further measurements will be taken from project participants. These are to be at a frequency that accommodates for the potentially short lifespans of care home residents but is not too frequent to become a large task for care home residents and staff.
- **Annual survey** – conduct annual survey with care staff which evaluates to what extent the intervention has affected mood and wellbeing of residents.
- **Final Measurements** - A final measurement will be taken for all residents involved with the project during the last six months of the Making Pals project.

- **Outputs** - The measurement framework will most likely be based on the WEMWBS well-being evaluation framework. Allowing for the overall well-being for each home to be measured during its involvement with the project.

- **Making Pals will improve the well-being and happiness of care home Staff**

The project team will look to use the same well-being measurement framework for care home staff as residents. This will most likely take the form of a mobile/tablet friendly online survey

- **Baseline** - Baselines will initially be taken from staff working in 10 care homes who will be working closely with Making Pals in the first six months of the project. After this staff in each care home who become involved in the project will be asked to complete a baselining survey.
- **Ongoing measurements** - At an interval to be agreed with the evaluator, ongoing measurements will be taken. These are to be at a frequency that accommodates for the potentially high turnover of care home staff but is not too frequent as to become a large task.
- **Final Measurements** - A final measurement will be taken for all staff involved with the project during the last six months of Making Pals.
- **Outputs** - The measurement framework will most likely be based on the WEMWBS well-being evaluation framework and aspects of Alive!'s existing evaluation frameworks. This will allow for the overall well-being for each home to be measured during its involvement with the project.

- **Making Pals will improve the public's perceptions of care homes**

A survey will be circulated nationally and postcodes collected to ensure we are able to measure only the project's target area.

- **Baseline**- An online survey will be promoted over the course of four months with supplementary offline collection methods to be agreed on with direction from the evaluator.
- **Ongoing measurements**- The online survey will re-open for four months at the midpoint of the project and previous respondents emailed to take part. Offline collection methods will also take place.

- **Final Measurements-** The same exercise will be repeated during the final six months of the project.
 - **Outputs-** The evaluator will receive national data detailing the public's opinion over three years and will be able to compare the impact Making Pals has had on opinions towards care homes in Greater Bristol compared to areas without similar projects.
-
- **Making Pals will increase the level of community engagement conducted by care homes**
 - **Baseline-** A survey will be emailed to all care homes in Greater Bristol and promoted nationally to help the project understand levels of community engagement in care homes. It will look into;
 - Who is currently engaged with care homes and how often
 - Real and Perceived barriers to engagement
 - Access to transport and its effect on engagement
 - **Ongoing measurements-** As new care homes begin to work with the project, they will be asked to complete the survey.
 - **Final Measurements-** The survey will be sent out to all care homes nationally and in the Greater Bristol area during the last six months of the project.
 - **Outputs-**The evaluator will receive completed surveys from care homes who have worked with us, homes who have not worked with us but are in the Greater Bristol area who will have benefited indirectly from the project and those care homes outside of Greater Bristol who will not have been affected by the project.
-
- **Making Pals will increase the number of local community groups offering to run activities in care homes**
 - **Baseline-** Baseline levels of engagement will be taken from the above-mentioned survey detailing the level of Community Engagement already taking place in care homes.
 - **Ongoing measurements-** The project team will monitor the increase in offers from the public it receives over the course of the project.

- **Final Measurements-** The above-mentioned survey will be distributed during the final six months of the project.
- **Outputs-** The above-mentioned survey will provide details of the increase in community engagement if any, and what proportion of this is initiated by the community. This will be supplemented with qualitative interviews in eight care homes, some who have been involved in the whole project, some for a portion and others that were not involved with the project at all.

3.2.2. Planned qualitative evaluation methods

In addition to the above-named methods we will be completing interviews with, residents, care home staff, managers and activity coordinators. A proportion of these interviews will be filmed where possible and include an interview with the same person at the beginning and the end of the project to illustrate the impact of the interventions in a short film at the end of the project. These interviews will be completed by the project team and the evaluator will be provided with the film or audio recordings to be considered in their evaluation.

These interviews will be completed to a discussion brief consisting of a maximum ten questions to be agreed on by the evaluator and the project team.

Throughout the project the team will also be collecting case studies of individual interactions the project has brought about, these will also be made available to the project evaluator.

3.2.3. Issues outside of the scope

The project does not aim to impact on the following groups, areas or issues and these should not be considered when evaluating the project;

- **Stakeholders outside of the Greater Bristol Area-** Greater Bristol can be defined as within the counties of Bristol, Bath and North-East Somerset, North Somerset & South Gloucestershire. However, information will be gathered nationally by two surveys (The Public's Perception of Care Homes & Community Engagement in Care Homes), and this national data can be used as a control to prove the effectiveness of the project in its target area.
- **Care homes who are not supporting adults over 65 years old-** The project will not aim to impact on the public's perceptions or community engagement within care homes for younger adults.

- **Extra Care homes or those providing sheltered accommodation & extra care-** Although these stakeholders may become involved with the project and indirectly benefit from the achievement of the project's outcomes they are not specified as target stakeholders in the funding bid and should not be considered in the evaluation.
- **Recipients of Domiciliary Care-** Although these stakeholders may indirectly benefit from the achievement of the project's outcomes they are not specified as target stakeholders in the funding bid and should not be considered in the evaluation.

3.3. Possible Barriers to Evaluation

Due to the nature of some stakeholder groups the project will be working with, there are a number of possible barriers and difficulties that should be considered when agreeing on an evaluation methodology;

- **Gathering accurate data** and communicating effectively with residents who are living with cognitive impairments e.g. dementia, learning difficulties
- **Communication with residents** living with physical disabilities and sensory impairments e.g. Deafness, Blindness
- **Lifespan of care home residents** for a longitudinal study of well-being
- **Quick turnover of care staff** for a longitudinal study of well-being
- **Time of care home staff and managers** to help facilitate data collection

4. Managing the Evaluation

4.1. Timescales

- **Finalise Evaluation Methodology- September – November 2017**

The evaluator will advise on the methods the Making Pals team proposes to measure the above objectives before baselines are taken to ensure the subsequent data is useful for the evaluator at project end.

- **Taking Baselines- November 2017- January 2018**

The project team will measure the project's baselines.

- **Midterm Review- March – July 2019**

The evaluator will spend some time advising the project as it takes mid-project measurements for a number of its objectives. At this time, the evaluator will also take the time to look at the data which has been collected on an ongoing basis and ensure its continued quality.

- **Final Evaluation- January – March 2020**

The evaluator will be presented with data collected during the project and will produce a report assessing to what extent the project has achieved its aims.

4.2. Deliverables

The evaluator will be expected to produce the following products;

- **Phase 1- September – November 2017** - The evaluator will assess and refine the proposed evaluation methodology, producing a written plan detailing how the evaluation data should be collected.
- **Phase 2- March – July 2019** - The evaluator will produce a short mid-term assessment of the project's progress so far and guide the project team on its focus for the second half of the project term.
- **Phase 3- January – March 2020** - The evaluator will produce a full report detailing to what extent the project has achieved its aims. The report should include the following.
 1. *Executive summary*
 2. *Background of project*
 3. *Summary of evaluation methods*
 4. *Findings from baselines*
 5. *Summary of project methods*
 6. *Effectiveness of project methods in achieving objectives*
 7. *Lessons Learned*
 8. *Opportunities for improvement*
 9. *Best Practices*

4.3. Ownership

Reports for all phases of the evaluation and all documentation produced for it will be the joint property of Alive! and the evaluator.

Alive will have full rights for the promotion of the evaluation, and its findings after project closure. The evaluator should seek approval when looking to use the evaluation for anything other than the personal promotion of the evaluating individual or agency.

4.4. Roles and Responsibilities of Parties

The following roles will be in place in order to deliver the Making Pals project and its evaluation;

- **Project Manager & Primary contact for Evaluator; Emma Dyer** (Primary contact in the absence of Project Manager, Jennie Reed, Marketing Manager)
- **Project Assistant; Hayley Rodgers**
- **Donor advisor; Terri Mc Donald**

Evaluators will be supported by the project team in order to gather the data, interviews and resources needed in order to complete a thorough evaluation of the project.

4.5. Payment Schedule

The evaluator will be paid by bank transfer within 30 days of invoicing after their involvement with each phase of the evaluation timeline. This is as follows;

- Finalise Evaluation Methodology & Taking Baselines- *September 2017- January 2018* – **Payment February 2018**
- Midterm Review- *March – July 2019* – **Payment August 2019**
- Final Evaluation- *January – March 2020* – **Payment April 2020**

5. Submission details

5.1. Evaluator Specification

Making Pals is inviting submissions from evaluators with the following skills and experience;

- Proven experience evaluating projects of a similar scope and scale
- Experience producing evaluation plans and reports
- Extensive experience analysing qualitative and quantitative data
- Degree or higher level qualification in monitoring & evaluation or relevant subject

The following skills and experience are desirable but not essential;

- Experience evaluating projects with a focus on behaviour change
- Experience of running evaluations for a project where its stakeholders live with cognitive and physical impairments.
- Experience presenting evaluation reports in accessible and usable formats

5.2. Submission requirements inc. Quote

The submission required by the evaluator in order to aid the selection is as follows;

We would like the prospective evaluator to produce a brief document. This should be no more than 4 sides of A4. It should summarise how they would approach this work, propose any tactics that they would employ to achieve maximum efficiencies and set out clearly what they could deliver. This should include the following sections:

- Three to five points detailing any improvements you would make to the project's planned evaluation methods.
- A document outline, headings only, of how you would propose to present the final evaluation report.
- Details of who would be carrying out each phase of the evaluation. E.g. yourself, a member of staff, freelance colleague
- Number of days per phase, daily rate and overall cost of the evaluation, broken down by project phase and daily rate to be charged. Where more than one evaluator is utilised, the proposal should make clear any

differences in day rates between evaluators and the allocation of tasks between them

- Summary of key knowledge, experience and skills of the evaluator, including two references of organisations for whom they have conducted similar work
- An example of previous work conducting evaluations, preferably including examples of working with similar stakeholders.
- CVs of any additional staff who will be involved in the evaluation.

5.2.1. Submission & Appointment Timeline

- **Expressions of interest and submissions invited** – until Mid-August 2017
- **Shortlisting of Candidates** – Mid August 2017
- **Candidate interviews** – Late August – Early September 2017
- **Appointment of Evaluator**- Early September 2017

5.2.2. Contact Details

For submissions, more information or any questions regarding this term of reference, please contact either

- **Emma Dyer**
Project Manager
Emma@aliveactivities.org
0117 35 33963

Or in the absence of the Project Manager

- **Jennie Reed**
Marketing Manager
Jennie@aliveactivities.org

0117 37 73645