

## Project record Keeping

### **The importance of records.**

The purpose of records is to facilitate service to the client or consumer.

Records should be accessible and transparent for others:-

- a) Professionals, volunteers who may need to pick up on the work from the case.
- b) The person who may well wish to see what is written about themselves

It is considered good practice for each consumer to have open access to their own records.

Remember that record form a part of a person's identify and as such they may wish to add to them/or comment on them.

### **Efficiently maintained and systematic records provide:**

**Factual information** such as names addresses, date of birth, details of family, racial, and cultural back ground, language, religion, special requirements, other key agencies involved etc. Such basic information is essential for assessment and planning purposes both on an individual basis and for the project or service as a whole.

**Continuity.** An up to date concise record enables other colleagues to appraise work and to continue to provide a consistent and relevant service. This is essential in reducing opportunities for omissions in practice which may lead to tragedy.

**Clarity of Goals and planning of work.** The very process of recording contacts may help clarify thinking and discourage rigidity of approach, complacency or cynicism. Records are used to facilitate clarity of goals and are an aid to planning.

record → plan → visit → record → evaluate → plan → visit  
etc

**Accountability and evidence.** Maintaining effective records helps demonstrate what work has been undertaken and the outcomes and can therefore help things progress for the individual and for service provision.

**An aid to organisation/project monitoring and evaluation.** Records provide a means of establishing whether an organisation is fulfilling its purpose and is maintaining its standards. This has a dual effect- the combination of quality records and management information provides a defence against possible accusations, from media, public, or politicians of failure to meet obligations and also serves to provide evidence, to those same bodies, of the impact of economic and social policies on vulnerable members of society. Thus aiding funding applications.

Norfolk Children's Fund Guide to record keeping for projects and services.

**An aid to service development.** In extracted and anonymous form, information from records can provide useful material for the future planning of services.

### **Your records should be**

- Brief
- Factual, make the difference between fact and your opinion clear
- Precise
- Anti discriminatory, i.e. avoiding labels
- Up to date- Entries should be made at the time or as soon as possible after each contact.
- Include details of actions agreed, who by and by what date.