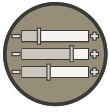


CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

BENCHMARK #7: This benchmark is designed to help you understand the impact of your efforts to support wellness. It also reflects how findings from your evaluation are communicated to ensure continuous improvement efforts in your worksite wellness initiatives.



BENCHMARK #7:

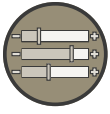
CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Guiding Principles

- » Our metrics and evaluation are comprehensive, rigorous and meaningful
- » We evaluate the full value of our investment in the health and wellness of our employees
- » Meaningful measures and objective success criteria reflect the stated goals of the organizations (strategic priorities) for supporting health and wellness
- » Data is shared with major stakeholders to provide the story of progress
- » We use what we learn to iterate and improve our approaches

Strategy

- » We have a comprehensive evaluation strategy based on a guiding framework (see Benchmarks #1 and #4)
- » We continuously evaluate meaningful outcomes about the workforce and workplace
- » Synthesis and analysis of information is rigorous, unbiased, and inclusive
- » We are making progress toward our vision for wellness
- » We communicate findings with all stakeholders
- » We celebrate our successes
- » We use what we learn to iterate and improve our approaches



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

5 Reasons Why People Don't Evaluate

1. They confuse evaluation with research
2. They are afraid the weaknesses of their initiatives will be exposed
3. They don't feel like they have enough time
4. They didn't budget for it
5. Their initiatives are poorly organized

But, evaluation is essential because it allows you:

- » To obtain feedback that will improve your initiative efforts
- » To demonstrate the value of your initiative
- » To measure change
- » To secure funding
- » To establish accountability
- » To compare the efficacy of interventions (unintended consequences can be unearthed)
- » To reflect, recharge and reinvigorate programs/initiatives

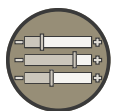
The goal is to conduct a critical appraisal for the purpose of IMPROVING your health and wellness program.

Essential Practitioner Mindset to Great Program Evaluation

- » Learning is an important part of program evaluation (what works, what doesn't)
- » It's going to be challenging, but is valuable to your work
- » Transparency of program reporting pays off in the long run
- » The goal is to improve and not prove your program
- » Always be looking for ways to improve the program

What Can You Evaluate?

- » Participation
- » Participation satisfaction
- » How people learn about the programs and initiatives
- » Changes in health behaviors and health practices
- » Changes in biometric measures
- » Increases in productivity
- » Changes in medical claims
- » Changes in organizational culture
- » Organization effectiveness



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

- » Environment
- » Culture
- » Progress toward organization's vision of wellness
- » Employee performance and engagement
- » How successful are employees at achieving the health goals that they set for themselves
- » Value of Caring: <http://edingtonassociates.com/caring-shared-value/>

When Can You Evaluate?

- » Ongoing
- » Annual
- » Pre/Post Intervention

Types of Evaluation

PROCESS EVALUATION involves measuring how a program, initiative or activity is implemented in order to control, assure or improve the quality of the delivery. The goal is determine how participants felt about the program, if they attended, why they attended and if they didn't attend, why. i.e. scheduling a nutrition education program as a learning lunch program and evaluating promotion, program and speaker.

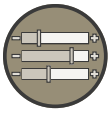
IMPACT EVALUATION focuses on the immediate observable effects of a program, initiative or activity leading to the intended outcomes. The metrics look at short term changes in knowledge, attitudes, skills and behaviors that may have resulted from participation in a program. i.e. tobacco cessation programs are intended to impact smoking rates.

OUTCOME EVALUATION focuses on the overall goal or outcome of the program, initiative or activity. In this case, metrics that are typically collected evaluate the financial outcome or health outcomes. i.e. wellness programs around improving sleep habits impact absenteeism, presenteeism and productivity.

How Can You Capture Evaluation Results?

METHOD	TYPE OF EVALUATION
Direct Observation	Process
Gantt Chart	Process
Focus Groups	Process, Impact
Surveys/Audits	Process, Impact
Program and Evaluation Forms	Impact
Health Risk Assessments	Impact, Outcome
Health Screening	Process, Outcome
ROI, Cost Benefit Analysis	Outcome
Medical Claims Evaluation	Outcome

MOST IMPORTANT METRIC: IT IS THE ONE THAT WILL HELP YOU DETERMINE WHETHER YOU MET THE GOALS THAT YOU SET OUT TO ACHIEVE WITH YOUR INITIATIVE.



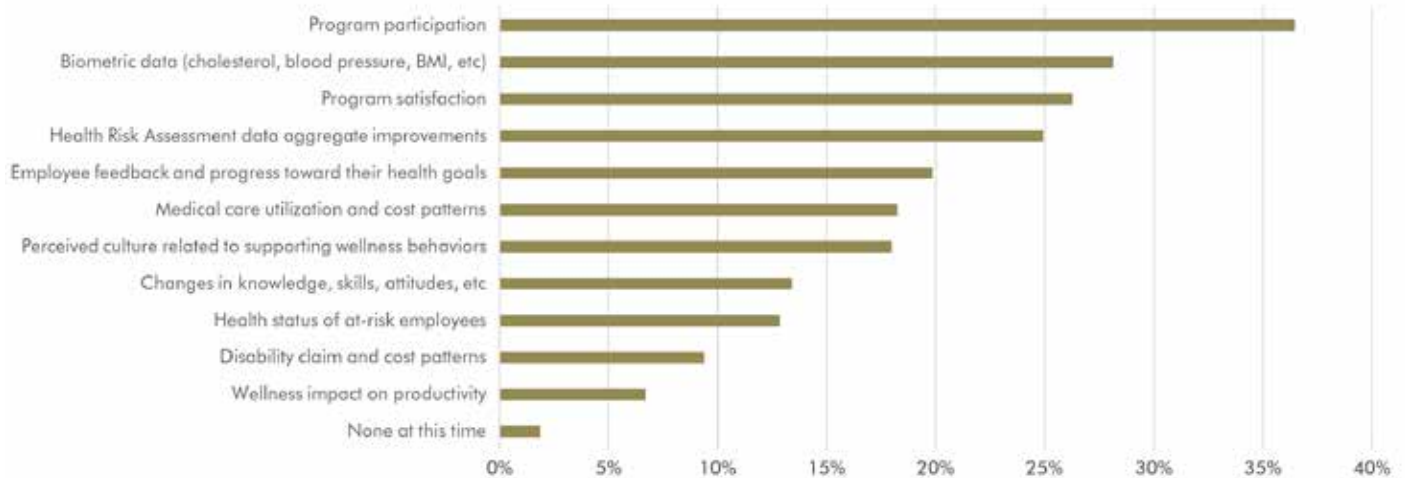
BENCHMARK #7:

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What Do Others Evaluate?

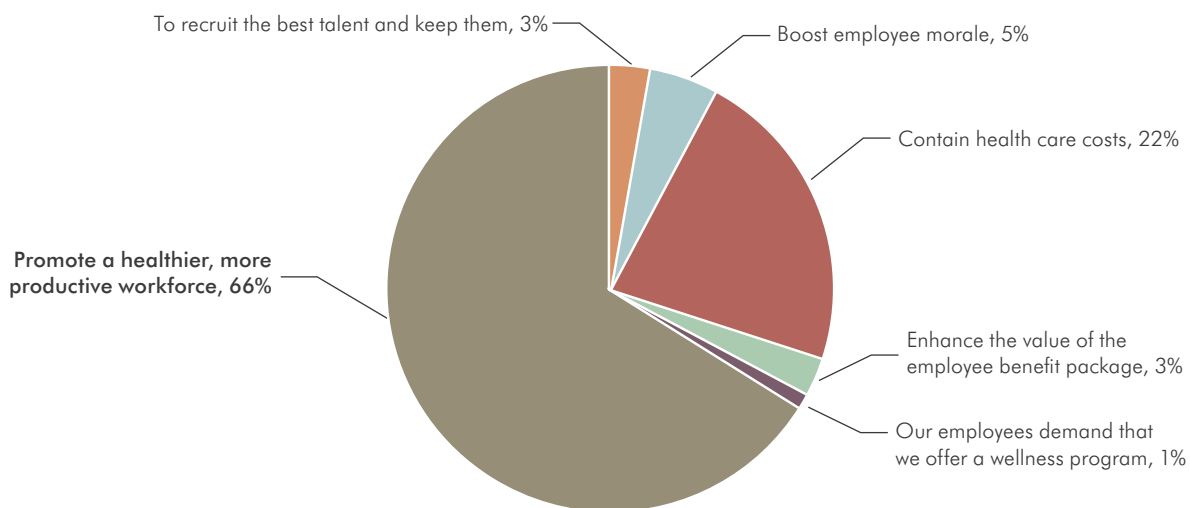
The findings from a recent WELCOA Member Survey are below. The question that was asked: “What program areas/outcomes do members consistently evaluate?”

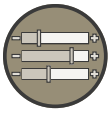
AREAS OF WORKSITE WELLNESS INITIATIVES THAT ARE CONSISTENTLY MEASURED BY MEMBERS



Success Criteria

PRIMARY REASON FOR OFFERING WELLNESS PROGRAM



**BENCHMARK #7:**

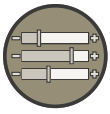
CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Sample Evaluation Plan

STAKEHOLDER GROUP: Program development and implementation teams.**EVALUATION PURPOSE:** Process evaluation – Ensure the program is working as intended and identify areas for improvement.

EVALUATION QUESTIONS	MEASURES	DATA SOURCES/METHODS	EVALUATION PARTNERS	TIMELINE
Are we attracting the intended audience to participate?	Program participation rates » By demographics » By health status » By location Goals: 50% overall participation rate; 75% of participants represent target population for program	» ABC Vendor participation report » Health assessment survey report » Claims analysis	» ABC Vendor » XYZ Health plan » Ace Consulting	» Monthly participation Quarterly review after close of health assessment » Annual integrated claims analysis by consulting firm
Are participants completing the assumed number of sessions?	Number of sessions completed Goal: 90% of participants will complete 4 out of 5 sessions	» ABC Vendor detailed program engagement report	» ABC Vendor	» Quarterly
Are participants satisfied with the program?	Participant satisfaction rates Goal: 80% of participants will be satisfied or very satisfied	» ABC Vendor satisfaction report	» ABC Vendor	» Quarterly
What are the barriers to participation or the reasons some participants drop out?	» Frequency distribution on barriers to participation » Attrition rates Goal: <10% will drop out after first session due to program quality or content	» ABC Vendor satisfaction report – attrition analysis » Post program surveys » Focus groups with eligible non-participants	» ABC Vendor » Ace Consulting	» Within 30 days of program end
Are participants achieving personal goals they established at start of program?	Goal achievement rates and frequency distribution Goal: 80% of participants will report meeting primary goal	» Post program surveys	» ABC Vendor	» Within 30 days of program end

Wellness Program Evaluation Best Practices WELCOA Institute Course - reference material



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Communicate Your Findings

- » Connect it to the bottom line
- » Keep it simple
- » Use pictures or a dashboard
- » Tell a compelling story
- » Invite feedback

Consider the following questions when preparing your report/presentation:

What level of detail will your stakeholders expect to see? It will be different for senior leaders and program administrators; determine the goals to speak to

What is the organization's standard way of reporting?

Who will receive the evaluation? Will there be a formal presentation or document distributed and will there be an opportunity to ask questions?

Develop a Dashboard

Consider the story that you want to tell and highlight the select metrics that tell that story. You will focus on the outcomes that most likely result in questions from your stakeholders about the results. You can customize your dashboard to share the information that tells the best story about your initiatives.

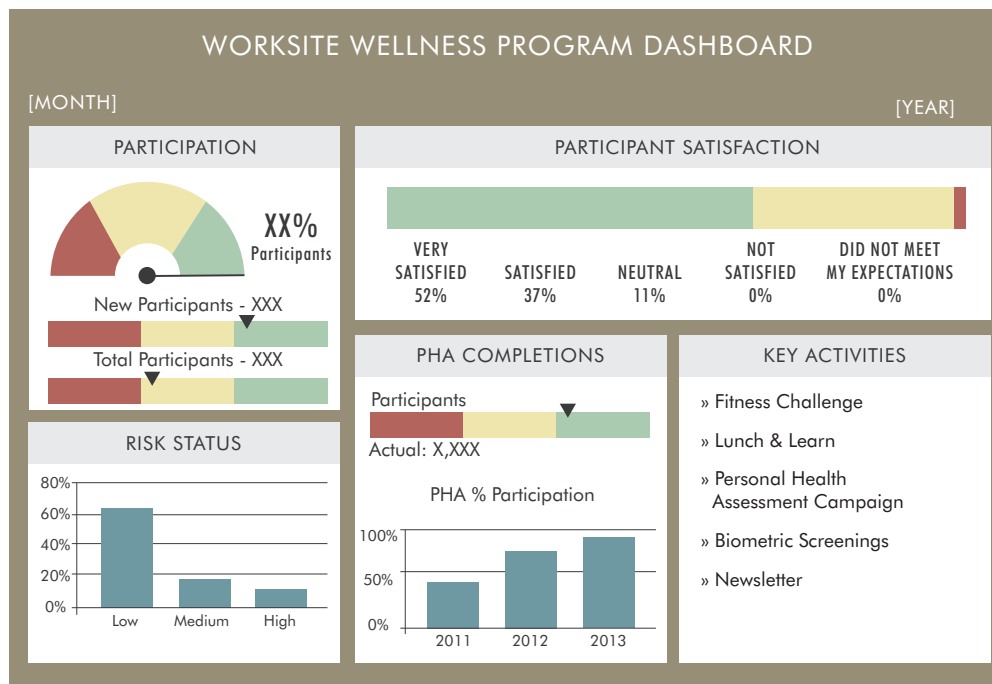
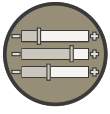


Diagram from Wellness Program Evaluation Best Practices WELCOA Institute Course - reference material



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Dashboard Idea 1:

Immediately following an initiative or an intervention, report on the following:

- » Participation rates
- » Satisfaction rates
- » Key Process improvement measures
- » Look at the rates in comparison to: locations, job types, or other demographics that you are interested in sharing information about

Dashboard Idea 2:

Showing Programmatic Evolution. Using this type of outcomes report, you can connect the dots to show how one result drives another result.

SECTION 1: PROCESS IMPROVEMENT MEASURES

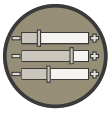
- » Participation Rates
- » Satisfaction Rates
- » Short Term Behaviors

SECTION 2: SHORT TERM IMPACTS

- » Attitudes
- » Beliefs
- » Skills
- » Behaviors

SECTION 3: TRANSLATE THE OUTCOMES TO THE BIGGER PICTURE

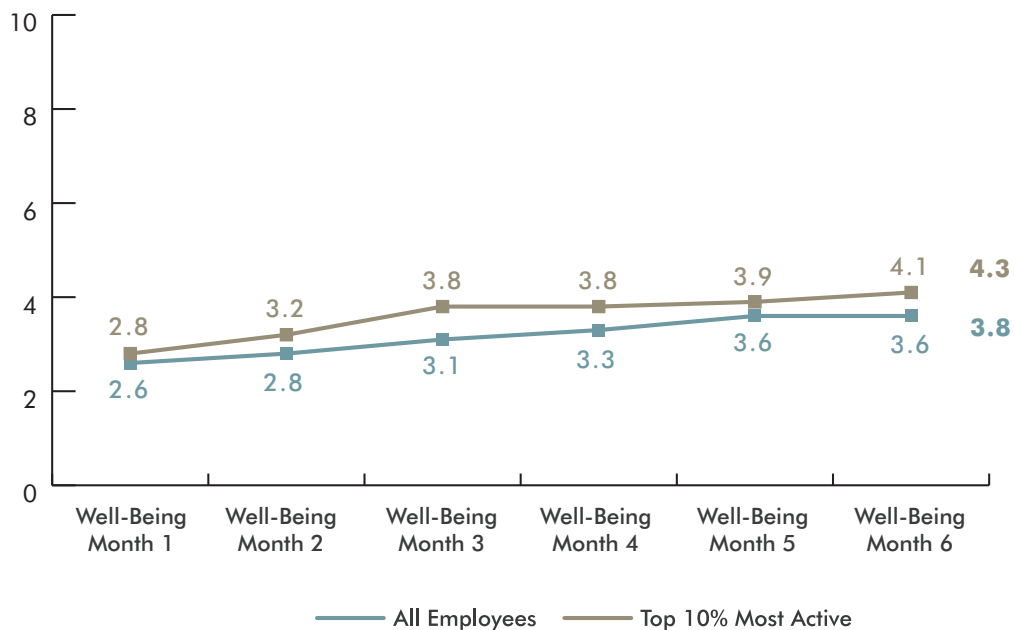
- » Establish the key metrics that are part of your strategic goals from your operating plan
- » Show how the metrics you have chosen have trended over time
- » Drill into certain cohort groups to further communicate impact and opportunity (i.e. what does the top 10% of most engaged participating show improvement in overtime compared to the group as a whole



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

IMPACT OF PHYSICAL ACTIVITY ON WELL-BEING RATINGS

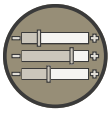


SECTION 4: TREND ANALYSIS

- » Example: Self reported wellbeing rating for program participants
- » Key metric: employee wellbeing
- » Intervention: physical activity

Provide a Summary showing:

- the impact of improved attitudes on productivity or employee retention
- that short term behaviors translate to improvements in health status
- how improved compliance with preventive care translates to future savings or improved health



BENCHMARK #7:

CONDUCT EVALUATION, COMMUNICATE, CELEBRATE, AND ITERATE

Resources List

EXPERT INTERVIEWS:

- » Communicating the Value of your Wellness Program *with* **Jessica Grossmeier** [GET THE RESOURCE »](#)
- » Evaluating the Total Value of Your Wellness Program *prepared by* **Jessica Grossmeier** [GET THE RESOURCE »](#)

INSTITUTE FOR WELLNESS STUDIES RESOURCES



Wellness Program Evaluation Best Practices

Program evaluation is essential for effective wellness programs. Learn how to approach evaluations and metrics from CEO of Verity Analytics, Jessica Grossmeier. This WELCOA Certification demystifies evaluation and discusses how to leverage program evaluation best practices that ultimately lead to better outcomes. Innovate for the future success of your program. This certification addresses the fundamentals of understanding how to capture the right data, what metrics matter and how to accurately evaluate your program.



The Total Value of Your Wellness Investment

Employee wellness programs and health promotion are under attack. Now more than ever, leaders in wellness know how to position the true value of wellness programs and services. Learn about the Value on Investment (VOI) for employee health promotion and what differentiates VOI from traditional ROI. Plus, discover which metrics are important when measuring wellness program success. Jessica Grossmeier of Verity Analytics gives you the facts. She will help you develop a strategy for evaluating metrics and reporting the value of your programs.



Wellness Program Evaluation 101

There are many reasons that wellness practitioners do not evaluate the impact of their programs; perhaps they feel like they have to be a statistician to evaluate impact, or they are concerned that their program does not have a powerful impact and do not want the numbers to prove them right. Whatever the concern, this certification series will help demystify the evaluation process and show you how you can leverage program evaluation best practices to achieve better outcomes and innovate for the future success of your program.



WELCOA's Seven Benchmarks: Beginner

There is both an art and science to designing and delivering a results-oriented workplace wellness initiative. In this flagship certification, you will be immersed in WELCOA's Seven Benchmark approach to building great wellness programs. As a result of finishing this certification, you will have the knowledge, confidence and the materials necessary to be successful. This training is perfect for entry-level practitioners and for those who are just getting started in the field.