

## Step 5. Evaluation

### Evaluation plan example

Consulting firm, Smith's Engineering, is a medium-sized workplace with 92 employees. In developing an evaluation plan for their workplace wellness program, they considered:

- › their wellness program action plan
- › what they need to know to demonstrate success
- › how and when they will measure it.

They included 3 types of evaluation indicators (process, impact and outcome) and 5 methods to collect the information they need:

- › registration or attendance records for each activity
- › feedback forms—completed by participants after each activity
- › employee evaluation surveys—conducted once/twice a year to ask about the strategies implemented
- › review processes or in-depth interviews—conducted after completion of a strategy to ask participants how things went
- › lifestyle risk assessments—conducted online annually to measure behaviour change over time.

### Year 1 progress

Smith's Engineering used evaluation information collected during the first year to revise their action and evaluation plans. Some of the changes they made include:

- › Despite heavy promotion, very few employees attended individual counselling sessions to quit smoking in the first 6 months. However, participation was high for group counselling sessions and, in feedback forms, employees indicated a high level of satisfaction. The wellness committee decided to only continue with the group counselling sessions.
- › A smaller budget for the 2014–2015 financial year meant it was no longer possible to provide additional lockers for employees. However, the wellness committee costed the additional lockers and secured funding for the following financial year. They communicated this change to employees.
- › From employee evaluation surveys, the wellness committee identified a strong interest in holding a team walking challenge. The committee brought forward the date for a walking challenge in response to everyone's enthusiasm.

**Tip: Read the action plan for Smith's Engineering in [Step 4. Action plan example](#)**

# Evaluation plan—Smith’s Engineering

## Goal A: To encourage employees to quit smoking

Objective: Reduce the number of employees that smoke by 15% within 18 months (June 2016)

Strategies and activities (summarised from example action plan)	Indicators	Evaluation tool	Timeframe
<p><b>Inform employees about the harm caused by tobacco smoking through:</b></p> <ul style="list-style-type: none"> <li>› lunchtime information sessions</li> <li>› quit smoking resources and posters.</li> </ul> <p><b>Support employees to quit smoking through:</b></p> <ul style="list-style-type: none"> <li>› individual and group counselling available to employees on-site</li> <li>› a peer support program.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategies delivered within allocated timeframes.</li> <li>› Number of employees participating in:               <ul style="list-style-type: none"> <li>- lunchtime information sessions</li> <li>- peer support program sessions</li> <li>- individual and group counselling sessions.</li> </ul> </li> <li>› Employee satisfaction from:               <ul style="list-style-type: none"> <li>- lunchtime information sessions</li> <li>- peer support program sessions</li> <li>- individual and group counselling sessions.</li> </ul> </li> </ul> <p><b>Impact indicators</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased awareness of the benefits of quitting smoking.</li> <li>› Increased number of employees who don’t smoke tobacco during work hours.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Decreased number of employees who smoke tobacco.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from:               <ul style="list-style-type: none"> <li>- lunchtime information sessions</li> <li>- peer support program</li> <li>- individual and group counselling sessions.</li> </ul> </li> <li>› Participant feedback forms (satisfaction, awareness, knowledge and intended changes in smoking behaviour) for:               <ul style="list-style-type: none"> <li>- lunchtime information sessions</li> <li>- peer support program</li> <li>- individual and group counselling sessions.</li> </ul> </li> <li>› Pre and post-employee evaluation survey (awareness, knowledge and changes in smoking behaviour).</li> <li>› Pre and post-lifestyle risk assessment to determine changes in smoking behaviour.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› Review process such as employee team meetings or focus groups, or in-depth interviews with managers and employees (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› After each session.</li> <li>› Beginning and end of the strategy.</li> <li>› Annually.</li> <li>› End of the strategy.</li> </ul>

**Objective: Create a workplace environment that encourages employees to quit smoking within 6 months (June 2015)**

Strategies and activities (summarised from example action plan)	Indicators	Evaluation tool	Timeframe
<p><b>Develop and implement a smoke-free policy in the workplace by:</b></p> <ul style="list-style-type: none"> <li>› forming a working group</li> <li>› holding consultation forums</li> <li>› holding information sessions</li> <li>› communicating online and through inductions.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Policy developed within timeframes.</li> <li>› Number of employees participating in consultation forums and information sessions about the policy.</li> <li>› Employee awareness and satisfaction with the policy.</li> </ul> <p><b>Impact indicator</b></p> <ul style="list-style-type: none"> <li>› Number of times employees breach the policy.</li> </ul> <p><b>Outcome indicators</b></p> <ul style="list-style-type: none"> <li>› Decreased number of employees who smoke tobacco.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from forums and information sessions.</li> <li>› Intranet usage statistics (hits to policy webpage).</li> <li>› Employee evaluation survey (awareness of and satisfaction with policy).</li> <li>› Pre and post-lifestyle risk assessment to determine changes in smoking behaviour by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› In-depth interviews with managers and employees (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› Annually.</li> <li>› End of the strategy.</li> <li>› Annually.</li> <li>› End of the strategy.</li> </ul>

## Goal B: To encourage employees to increase their level of physical activity

**Objective:** Increase the number of employees who accumulate 150 to 300 minutes of moderate-intensity physical activity each week by 15 per cent within 12 months (June 2016)

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Inform employees about the benefits of physical activity by:</b></p> <ul style="list-style-type: none"> <li>› providing information about physical activity to employees.</li> </ul> <p><b>Promote team and group activities that encourage physical activity by:</b></p> <ul style="list-style-type: none"> <li>› holding a 12-week team walking challenge—10,000 Steps Workplace Challenge &lt;<a href="http://www.10000steps.org.au">www.10000steps.org.au</a>&gt;</li> <li>› forming walking groups at each site.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategies delivered within allocated timeframes.</li> <li>› Number of participants and teams for the walking challenge including range and type of employees.</li> <li>› Number of participants in walking groups.</li> <li>› Employee satisfaction with the team challenge, pedometers and walking groups.</li> </ul> <p><b>Impact indicators</b></p> <ul style="list-style-type: none"> <li>› Number of employees who report an increased awareness of the benefits of physical activity.</li> <li>› Increased number of employees achieving 10,000 steps a day.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Increased number of employees accumulating 150 to 300 minutes of moderate-intensity physical activity each week.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Team challenge registration forms.</li> <li>› Pedometer/hat distribution records.</li> <li>› Participant feedback forms (satisfaction, awareness, knowledge, achievement of 10,000 steps a day and changes in amount of physical activity) from team walking challenge and walking groups.</li> <li>› Pre and post-employee evaluation survey (awareness, knowledge and changes in amount of physical activity).</li> <li>› Pre and post-lifestyle risk assessment to determine changes to physical activity levels by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› Review process such as employee team meetings or focus groups, or in-depth interviews with coordinators and leaders (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› Throughout team walking challenge.</li> <li>› After 12-week walking challenge and every 6 months of walking group sessions.</li> <li>› Beginning and end of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

**Objective: Create a workplace environment that promotes and encourages employees to be more active within 6 months (December 2015)**

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Create a flexible work options policy to support employees to be active by:</b></p> <ul style="list-style-type: none"> <li>› forming a working group</li> <li>› holding consultation forums</li> <li>› holding information sessions</li> <li>› providing resources</li> <li>› communicating online and through inductions.</li> </ul> <p><b>Provide facilities that support physical activity, for example:</b></p> <ul style="list-style-type: none"> <li>› lockers.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategies delivered within allocated timeframes.</li> <li>› Number of employees participating in consultation forums and information sessions about the policy.</li> <li>› Number of employees using an additional locker.</li> <li>› Employee awareness and satisfaction with the policy and facilities.</li> </ul> <p><b>Impact indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees using flexitime or breaks to be active.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Increased number of employees accumulating 150 to 300 minutes of moderate-intensity physical activity each week.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from consultation forums and information sessions.</li> <li>› Intranet usage statistics (hits to policy webpage).</li> <li>› Locker allocation records.</li> <li>› Employee evaluation survey (awareness of and satisfaction with policy and facilities, use of policy and facilities).</li> <li>› Pre and post-lifestyle risk assessment to determine changes to physical activity levels by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› In-depth interviews with managers and employees (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› Annually.</li> <li>› Annually.</li> <li>› End of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

## Goal C: To encourage healthy eating at work

Objective: Increase awareness and knowledge of healthy eating among employees within 12 months (June 2017)

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Inform employees about the benefits of healthy eating by:</b></p> <ul style="list-style-type: none"> <li>› holding information sessions</li> <li>› holding healthy cooking demonstrations</li> <li>› holding a workplace healthy recipe competition</li> <li>› developing a cookbook</li> <li>› developing resources.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategy delivered within allocated timeframes.</li> <li>› Number of information sessions and cooking demonstrations</li> <li>› Number of employees participating in information sessions and healthy cooking demonstrations.</li> <li>› Employee satisfaction with information sessions and cooking demonstrations.</li> <li>› Number of entries in the healthy recipe competition.</li> <li>› Number of healthy recipe cookbooks distributed.</li> </ul> <p><b>Impact indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased awareness and knowledge of healthy eating.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased consumption of fruit and vegetables.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from: <ul style="list-style-type: none"> <li>- information sessions</li> <li>- cooking demonstrations</li> <li>- recipe competition.</li> </ul> </li> <li>› Participant feedback forms (satisfaction, awareness, knowledge and changes in healthy eating).</li> <li>› Pre and post-employee evaluation survey (awareness, knowledge, changes in healthy eating and strategy effectiveness).</li> <li>› Pre and post-lifestyle risk assessment to determine changes to healthy eating by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› Review process through employee team meetings or focus groups (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› After each session.</li> <li>› Beginning and end of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

**Objective: Increase the number of employees purchasing healthy food from the canteen by 15% within 12 months (June 2017)**

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Develop and implement a healthy food and drink options strategy by:</b></p> <ul style="list-style-type: none"> <li>› consulting with employees and a nutritionist</li> <li>› promoting the strategy</li> <li>› providing training for canteen employees about healthy food options.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategy delivered within allocated timeframes.</li> <li>› Number of employees participating in consultation forums about the proposed canteen changes.</li> <li>› Number of canteen employees attending training.</li> <li>› Number of healthy food options available at the canteen.</li> </ul> <p><b>Impact indicators</b></p> <ul style="list-style-type: none"> <li>› Increased sales for healthy food and drink options at the canteen.</li> <li>› Decreased sales for unhealthy food and drink options at the canteen.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased consumption of fruit and vegetables.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from consultation forums and canteen employee training.</li> <li>› Before and after comparison of healthy canteen menu options.</li> <li>› Canteen product sales figures.</li> <li>› Pre and post-lifestyle risk assessment to determine changes to healthy eating by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› In-depth interviews with canteen employees, managers and employees (satisfaction, barriers to participation, preferred communication channels and areas for improvement).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› Beginning and end of the strategy.</li> <li>› Beginning and end of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

**Objective: Increase healthy food options served at work meetings and functions within 6 months (June 2017)**

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Develop and implement a healthy catering policy by:</b></p> <ul style="list-style-type: none"> <li>› consulting with employees and a nutritionist</li> <li>› holding a launch event and information session</li> <li>› providing resources.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategy delivered within allocated timeframes.</li> <li>› Number of employees participating in consultation forums and information sessions about the policy.</li> <li>› Employee awareness of and satisfaction with the policy.</li> </ul> <p><b>Impact indicator</b></p> <ul style="list-style-type: none"> <li>› Number of meetings/functions applying the healthy catering policy.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased consumption of fruit and vegetables.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from consultation forums and policy information sessions.</li> <li>› Intranet usage statistics (hits to policy webpage).</li> <li>› Employee evaluation survey (awareness of and satisfaction with policy, use of policy).</li> <li>› Pre and post-lifestyle risk assessment to determine changes to healthy eating by employees.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› In-depth interviews with managers and employees (effectiveness of the policy).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› Annually.</li> <li>› End of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

## Goal D: To encourage enhanced social and emotional wellness of employees

Objective: Increase awareness and knowledge of social and emotional wellbeing of employees within 6 months (December 2015)

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Inform employees about social and emotional wellness and achieving work-life balance by:</b></p> <ul style="list-style-type: none"> <li>› consulting with employees</li> <li>› holding information sessions</li> <li>› developing resources.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategy delivered within allocated timeframes.</li> <li>› Number of information sessions delivered.</li> <li>› Number of employees participating in information sessions.</li> <li>› Employee satisfaction with information sessions.</li> <li>› Number of employees accessing information and/or support services.</li> </ul> <p><b>Impact indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased awareness and knowledge of social and emotional wellbeing and available support services.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased positive social and emotional wellbeing.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from information sessions.</li> <li>› Participant feedback forms (satisfaction, awareness, knowledge and changes in work-life balance) for information sessions.</li> <li>› Number of re-orders for information brochures.</li> <li>› Pre and post-employee evaluation survey (awareness, knowledge, changes in work-life balance and strategy effectiveness).</li> <li>› Pre and post-lifestyle risk assessment to determine changes in social and emotional wellbeing.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› Review process through employee team meetings or focus groups (satisfaction, barriers to participation, preferred communication channels, areas for improvement and additional topics).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› After each session.</li> <li>› Throughout the strategy.</li> <li>› Beginning and end of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>

**Objective: Create a workplace environment that supports employee social and emotional wellness within 12 months (June 2016)**

Strategies and activities	Indicators	Evaluation tool	Timeframe
<p><b>Provide induction and periodic training for managers on how to support the social and emotional wellness of employees by:</b></p> <ul style="list-style-type: none"> <li>› developing a training schedule</li> <li>› engaging external service provider.</li> </ul> <p><b>Create a flexible work options policy to support employees by:</b></p> <ul style="list-style-type: none"> <li>› forming a working group</li> <li>› holding consultation forums</li> <li>› holding information sessions</li> <li>› providing resources</li> <li>› communicating online and through inductions.</li> </ul>	<p><b>Process indicators</b></p> <ul style="list-style-type: none"> <li>› Strategies delivered within allocated timeframes.</li> <li>› Number of management training sessions, policy consultation forums and information sessions.</li> <li>› Number of employees participating in training sessions, policy consultation forums and information sessions.</li> <li>› Employee awareness of and satisfaction with training sessions, policy information sessions and the policy.</li> </ul> <p><b>Impact indicators</b></p> <ul style="list-style-type: none"> <li>› Number of managers/team leaders reporting increased awareness and knowledge of how to support employees.</li> <li>› Number of employees reporting that the policy supports them in achieving a better work-life balance.</li> </ul> <p><b>Outcome indicator</b></p> <ul style="list-style-type: none"> <li>› Number of employees reporting increased positive social and emotional wellbeing.</li> </ul>	<p><b>Quantitative methods</b></p> <ul style="list-style-type: none"> <li>› Attendance records from management training sessions, policy consultation forums and information sessions.</li> <li>› Intranet usage statistics (hits to policy webpage).</li> <li>› Participant feedback forms (satisfaction, awareness and knowledge) for management training sessions.</li> <li>› Employee evaluation survey (awareness of and satisfaction with policy).</li> <li>› Pre and post-lifestyle risk assessment to determine changes in social and emotional wellbeing.</li> </ul> <p><b>Qualitative methods</b></p> <ul style="list-style-type: none"> <li>› Review process through employee team meetings or focus groups (satisfaction, barriers to participation, preferred communication channels, areas for improvement and additional topics).</li> </ul>	<ul style="list-style-type: none"> <li>› After each session.</li> <li>› End of the strategy.</li> <li>› After each session.</li> <li>› End of the strategy.</li> <li>› Annually.</li> <li>› End of strategy.</li> </ul>