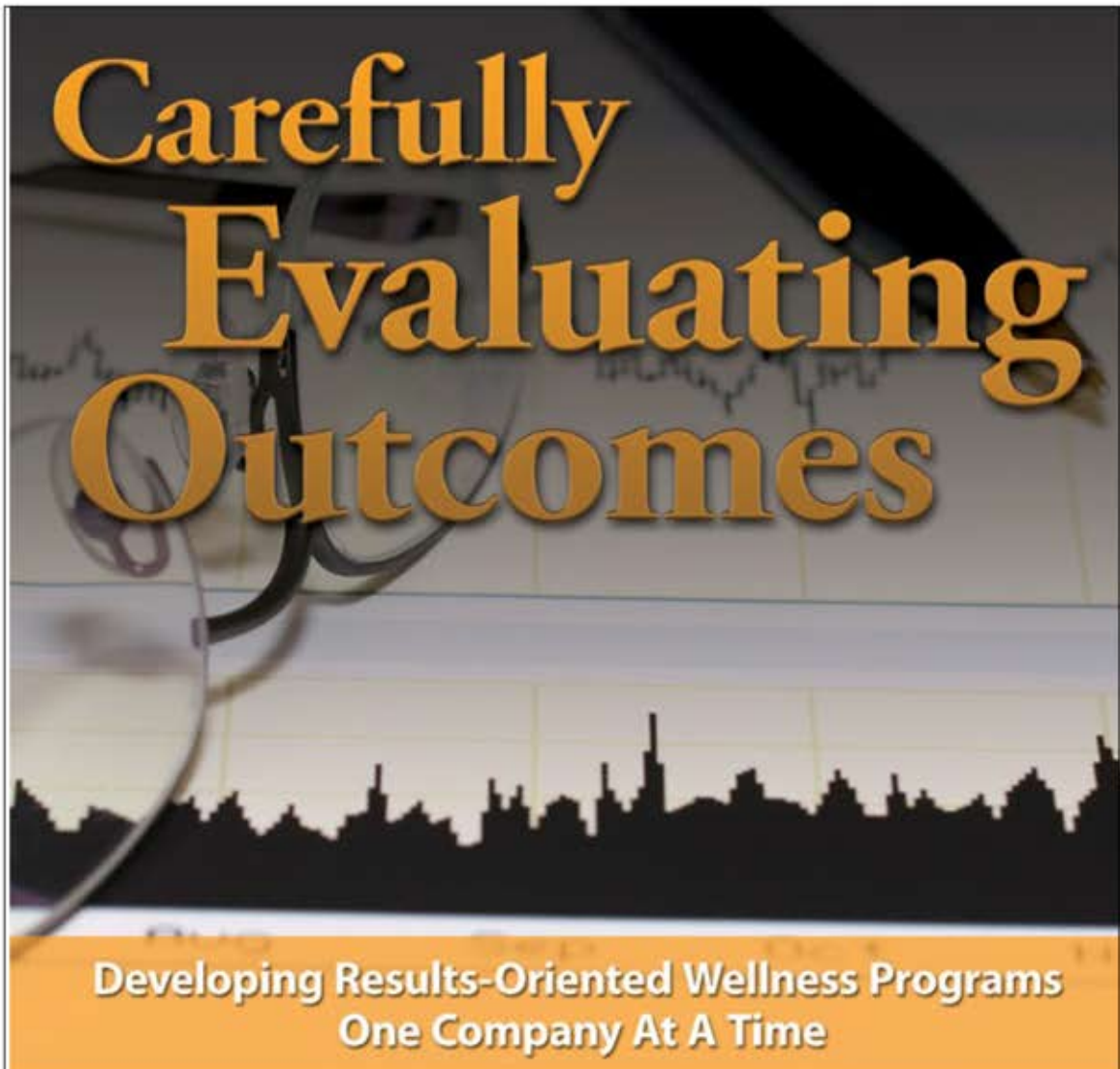


# Absolute ADVANTAGE

THE WORKPLACE WELLNESS MAGAZINE



## Carefully Evaluating Outcomes

Developing Results-Oriented Wellness Programs  
One Company At A Time



### IN THIS ISSUE:

This issue of *Absolute Advantage* is dedicated to addressing the topic of evaluation. By providing a rationale for the importance of evaluating outcomes, as well as offering up the fundamentals that should be included in any workplace wellness evaluation effort, this edition is the final installment in our examination of the seven benchmark Well Workplace process.

Each month you can learn more about the articles in *Absolute Advantage*. Simply log on to WELCOA's members only website to get more in-depth coverage of the topics that matter most to you. Find full-length interviews, expert insight, and links to additional information that will help you do your job better!

THE WELLNESS COUNCILS OF AMERICA

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LETTER FROM THE **EXECUTIVE EDITOR** | DAVID HUNNICUTT, PhD

# Carefully Evaluating Outcomes

## Developing Results-Oriented Wellness Programs One Company At A Time

In this issue of *Absolute Advantage*, we're addressing the topic of program evaluation. The last of the seven benchmarks, *Carefully Evaluating Outcomes*, this issue will address the importance of evaluation and some practical approaches to help you get the job done.

Specifically, we've divided the issue into four main sections. Initially, we'll present the Top Ten reasons why most wellness practitioners fail to evaluate outcomes. Next, we'll turn our attention to providing an overview of evaluation fundamentals. Appropriately titled, *The Fundamentals of Evaluation*, this article will address the why, what, how, and when of the evaluation process.

Having laid the groundwork by establishing the reasons for evaluating programs as well as the fundamentals for getting the job done, we turn our attention to the art and science of communicating the results to stakeholders and other interested parties within the organization.

Finally, we've consulted with one of the nation's most respected and talented evaluation experts—Dr. Steve Aldana. In this exclusive interview, Dr. Aldana shares his expertise and experience in the evaluation arena—you'll find this interview compelling and valuable.

We hope you enjoy this issue of *Absolute Advantage*.

Yours in good health,

Dr. David Hunnicutt  
President

“The last of the seven benchmarks, **Carefully Evaluating Outcomes**, this issue will address the importance of evaluation and some practical approaches to help you get the job done.”



# Absolute ADVANTAGE

VOLUME 6, NUMBER 10

THE WORKPLACE WELLNESS MAGAZINE

Organizational Founder, William Kizer, Sr.

## WELCOME

*Absolute Advantage* is the interactive workplace wellness magazine that helps large and small employers link health and well-being to business outcomes. *Absolute Advantage* arms business leaders and wellness practitioners with leading-edge workplace wellness information straight from the field's most respected business and health experts.

With its online component, *Absolute Advantage* provides the industry's most current and accurate information. By logging on to the magazine's interactive website, you can access a whole new world of health promotion—including in-depth interviews with national health promotion experts and insider's information about industry products.

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Information in this publication is carefully reviewed for accuracy. Questions, comments, or ideas are welcome. Please direct to Dr. David Hunnicutt, Executive Editor, at the address below.

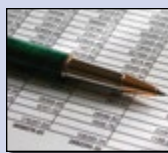
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## Top Ten Reasons...

Evaluation is one of those topics that strike fear into the hearts of worksite wellness practitioners. And over the years, we've come across dozens and dozens of the best excuses as to why practitioners don't evaluate their worksite wellness initiatives.

Here's our Top 10 list of the major reasons why people don't evaluate their worksite wellness programs.

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## 12 The Fundamentals of Evaluation

Evaluation need not be a complicated process. But in order to effectively and competently evaluate your worksite wellness initiative, you'll need to have some basic information. In this article, we'll present the fundamentals of evaluation.



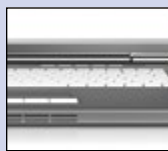
## 20 Communicating Your Evaluation Results

These days everybody talks about the "stickiness" factor—a concept that can help you greatly, especially when it comes to communicating your evaluation results. In this article, we'll put forth some useful tips to make sure that your evaluation results are taken seriously.



## 24 More Than Just Numbers

In this exclusive WELCOA interview, Dr. Steve Aldana, one of the nation's leading experts on workplace wellness evaluation recently sat down with WELCOA President Dr. David Hunnicutt to talk about the art and science of measuring the impact and outcomes of worksite health promotion initiatives.



## 30 Resources At The Ready

To help you identify top-notch workplace wellness resources, we've created a short list of books, manuals, and tools that you can't live without.



# WELCOA's Well Workplace Initiative

The Seven Benchmarks of Success

IN THIS ISSUE:  
**EVALUATING  
OUTCOMES**



For the past 20 years, the Wellness Councils of America has dedicated its efforts to studying and promoting the efforts of America's Healthiest Companies. During that period, WELCOA developed its patented Well Workplace process. At the core of the Well Workplace model, we have identified seven key benchmarks of success. Specifically, these seven benchmarks are inherent in companies that have built results-oriented workplace wellness programs.

## Benchmark #1

### Capturing CEO Support

From our experience, CEO support is essential to the process of developing best-in-class programs. Indeed, we know of very few programs that have contained costs and improved employee health that don't have strong senior level support.

## Benchmark #2

### Creating Cohesive Wellness Teams

Once CEO support has been captured, the next task is to create a cohesive wellness team. Teams are essential to building great wellness programs because they help to distribute the responsibility for wellness throughout the organization.

## Benchmark #3

### Collecting Data To Drive Health Efforts

The team's first and primary responsibility is not to start offering programs, but rather to step back and gather important data. The data will be collected using corporate culture audits, health risk appraisals, and knowledge and interest surveys. This data is extremely important because it will reveal the specific areas of health needs and interests within the organization.

## Benchmark #4

### Carefully Crafting An Operating Plan

With essential forms of data having been collected, the task is now to develop an operating plan for health and wellness within the organization. This operating plan will serve as the roadmap and will guide the company's efforts and investments in workplace wellness.

## Benchmark #5

### Choosing Appropriate Interventions

With the first four benchmarks completed, it is now appropriate to begin choosing and implementing the appropriate health and productivity interventions. These interventions will most likely include tobacco cessation, physical activity, weight management, self-care, and stress management. But, they also may include things like fatigue management and ergonomics—depending on what the company's data reveals.

## Benchmark #6

### Creating A Supportive Environment

Once the appropriate health promoting interventions are up and running, it's time to create a supportive environment. Indeed, by having a supportive environment, organizations can be confident that employees will be supported in their efforts to lead healthier lives. Environmental interventions may take the form of policies, physical modifications, and rewards and incentives.

## Benchmark #7

THIS ISSUE

### Carefully Evaluating Outcomes

The seventh and final benchmark in the Well Workplace model is carefully evaluating outcomes. It is within this benchmark that companies will religiously keep score when it comes to their wellness program. Evaluation targets include things like participation, participant satisfaction, behavior modification, and cost containment.

WELCOA's Well Workplace model has been adopted by more than 1,000 companies across the U.S.



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TOP  
10

Reasons  
Don't Evaluate  
Workplace  
Programs



# Why People Value Their Wellness

5 -By David Hunnicutt, PhD



**E**VALUATION IS ONE OF THOSE TOPICS THAT STRIKE FEAR INTO THE HEARTS OF WORKSITE WELLNESS PRACTITIONERS. And over the years, we've come across dozens and dozens of the best excuses as to why practitioners don't evaluate their worksite wellness initiatives.

Here's our Top 10 list of the major reasons why people don't evaluate their worksite wellness programs.

## 10. I Don't Feel Like I Have The Expertise

This is a common and widely-held reason why worksite wellness practitioners don't evaluate their programs. For some reason, perhaps it has to do with the intimidation of academia, people who are responsible for planning and delivering worksite wellness programs just don't feel like they have the expertise necessary to execute the evaluation component of their initiative.

And, while this may be a commonly held belief, it's not necessarily true in most situations. In fact, after years of watching the evolution of corporate worksite wellness programs, it's clear that practitioners do indeed have the expertise to evaluate their efforts. Thankfully, it doesn't require a PhD in statistics or even an academic degree in health promotion (although these will help greatly). Indeed, what is required is the forethought to identify priorities upfront, the willingness to write technically sound program goals and objectives, and the discipline to implement and monitor programs so that changes can be measured.

In essence, evaluation is as simple and as hard as that.

## 9. I'm Not Looking To Publish The Outcomes

When it comes to evaluating worksite wellness programs, we hear this reason a lot—which is why it's important to take this opportunity to emphasize the difference between research and evaluation.

From where we sit, research is the attempt to prove a hypothesis or demonstrate an outcome based on any given intervention. On the other hand, evaluation is the desire to improve your program based on findings and feedback. And there's a world of difference between the two.

We believe that research has a very necessary role in advancing the movement of workplace wellness on a national level. And it's extremely important in proving

the efficacy of certain interventions and practices. Indeed, there's little question that without the research efforts of some of the most intelligent people in our field, it's unlikely that the discipline would have made it into the mainstream—or that everyday practitioners would have useful models that can be copied and replicated in individual workplace settings.

And while research is extremely valuable, we believe individual evaluation efforts are equally as valuable. But again, it's important to understand that research and evaluation are two different things. Evaluation really focuses on the idea of getting feedback from participants and outcomes from interventions to improve the overall quality of your program, whereas research is more concerned with proving outcomes.





## 8. There Aren't Enough Hours In The Day

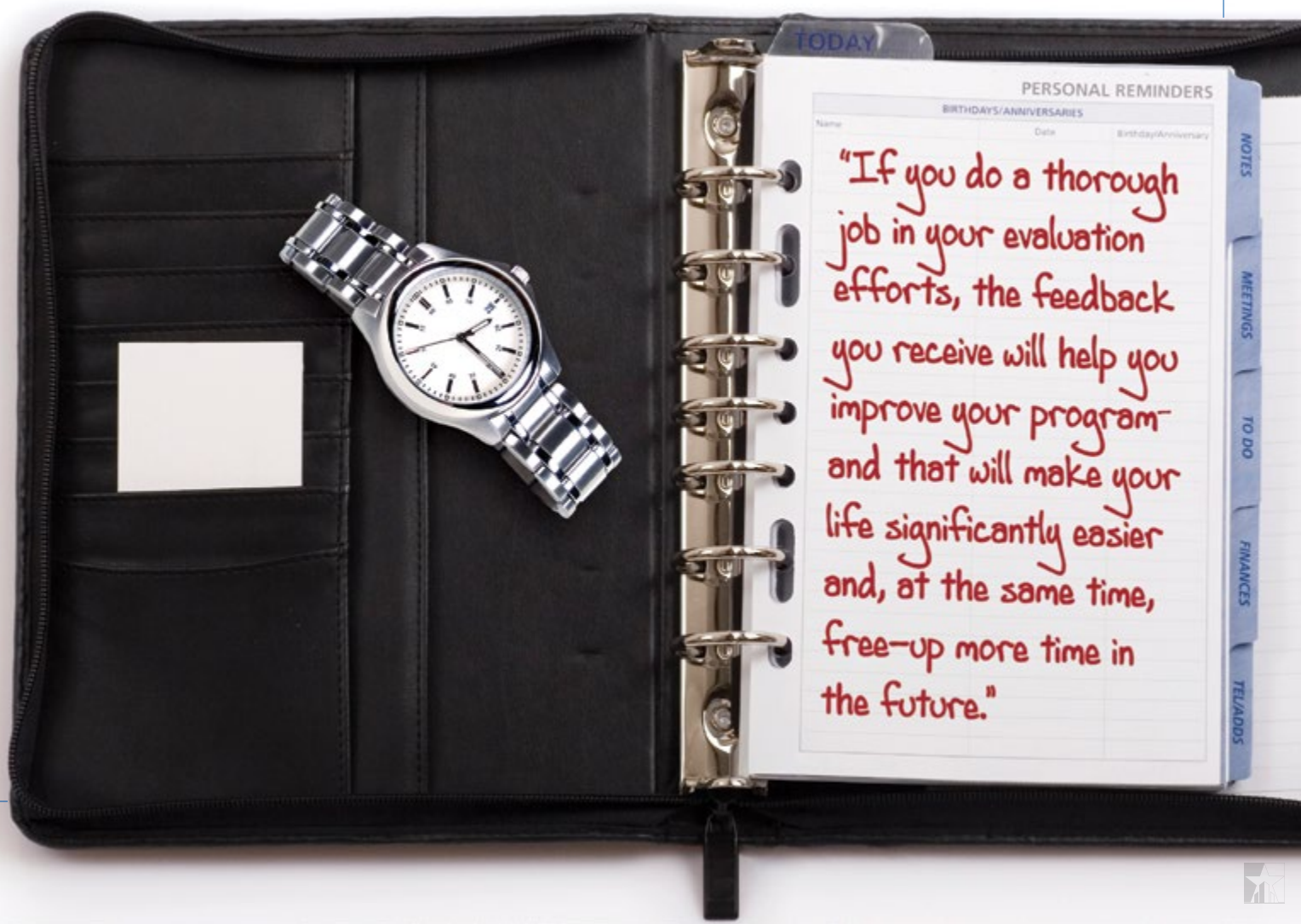
This statement is absolutely true, and we agree with it 100%. When it comes to protecting the health and well-being of employees, there really aren't enough hours in the day to get everything accomplished. But the unfortunate reality about this excuse is the fact that what practitioners are really saying is this: "I believe other tasks are more important than evaluating and monitoring outcomes."

Certainly, this is a struggle that every practitioner has to wrestle with on a daily basis. And while we are sympathetic and supportive to the plight of the practitioner, we must at the same time hold the line on emphasizing the importance of evaluating program outcomes. Obviously you can't spend too much time on evaluation and neglect other parts of your program, but it is important that you spend some time in each area. And if you do a thorough job in your evaluation efforts, the feedback you receive will help you improve your program—and that will make your life significantly easier and, at the same time, free-up more time in the future.

## 7. I Don't Want My Program's Shortcomings Exposed

This is a real fear for many worksite wellness practitioners. For people who are emotionally invested in worksite wellness programs, it can be difficult to digest the hard feedback received from program participants. And although it may sting a bit, it's essential that you solicit and receive feedback from participants on a regular basis—and the faster and better you do it, the more likely the shortcomings of your program will disappear.

A word of warning is appropriate here. It can be disheartening to receive corrective and/or negative feedback, especially early on in your programming efforts. But we would encourage you to remember that it's precisely this feedback that will help you and your program to grow. Sure, there will be some individuals who are brutal and mean-spirited in their communications. But for every negatron, you'll find that there are 10 others who are willing to give you important information that will help you make better programming decisions and thus raise the overall quality of your program.



## 6. The Results Aren't Taken Seriously Anyway

Another common reason why people don't evaluate is the reality that the results aren't taken as seriously as they should be. There's no question that this can be a real problem for worksite wellness practitioners, but it doesn't excuse you from not evaluating outcomes.

Perhaps the best way to address this issue is to divide it into two separate parts. Part one is the importance of making a commitment to evaluating outcomes in the organization as a whole. Part two is figuring out an effective way to communicate the results to others. And make no mistake about it, there's definitely an art and a science associated with effectively communicating evaluation results to senior-level supervisors.

By dividing and conquering, it's much easier to overcome this excuse associated with not evaluating the outcomes of worksite wellness initiatives. One final thought on this issue; even if the results aren't taken seriously within the organization as a whole, you still need evaluation data in order to improve your program, thus evaluation should remain a high priority.

## 5. I Won't See The Changes In My Lifetime

There's no question that it takes time to improve employee health and well-being. But just because changes are slow to occur doesn't give you an excuse for not evaluating your program's outcomes. Interestingly, as we've learned over time, the nation's best practitioners don't simply sit back and wait for behavioral changes to occur before evaluation results can be documented. In fact, the nation's best practitioners focus on important precursors to behavior change upfront—and they are monitored routinely and regularly.

For example, as a precursor to documenting behavior modifications and biometric changes, many practitioners choose to monitor things like participation and participant satisfaction early on in their programming efforts. In so doing, practitioners are able to get a better handle on the number of people who are regularly taking part in programs and how satisfied they are with the overall offerings.

It should come as no surprise to find that people who participate regularly and are happy with the quality of the programs also demonstrate behavioral changes over time.

Practitioners are absolutely right when they sense that demonstrating behavioral changes can be slow to occur. But the smartest ones use other evaluation data to provide feedback and create energy and enthusiasm in the overall evolution of the organization's wellness program.

“Even if the results aren't taken seriously within the organization as a whole, you still need **evaluation data** in order to improve your program, thus evaluation should remain a high priority.”



## 4. I Could Lose My Job If Outcomes Aren't Favorable

In a small minority of worksite wellness situations, this may very well be the case. And if you are a wellness practitioner working in this environment you have our sympathies—there's no question that you've got a tough job in front of you. However, for the vast majority of wellness practitioners, this is simply not the case. To the contrary, it is much more likely that you would lose your job if you don't constantly and continuously improve your programming efforts—and you need evaluation data to do this.

In working with companies across America for the last 10 years, it's more of the rule rather than the exception that health promotion practitioners are removed from their positions because their programs aren't continually updated and refined. Although it does happen, it is relatively rare that practitioners are let go simply because evaluation results aren't favorable.



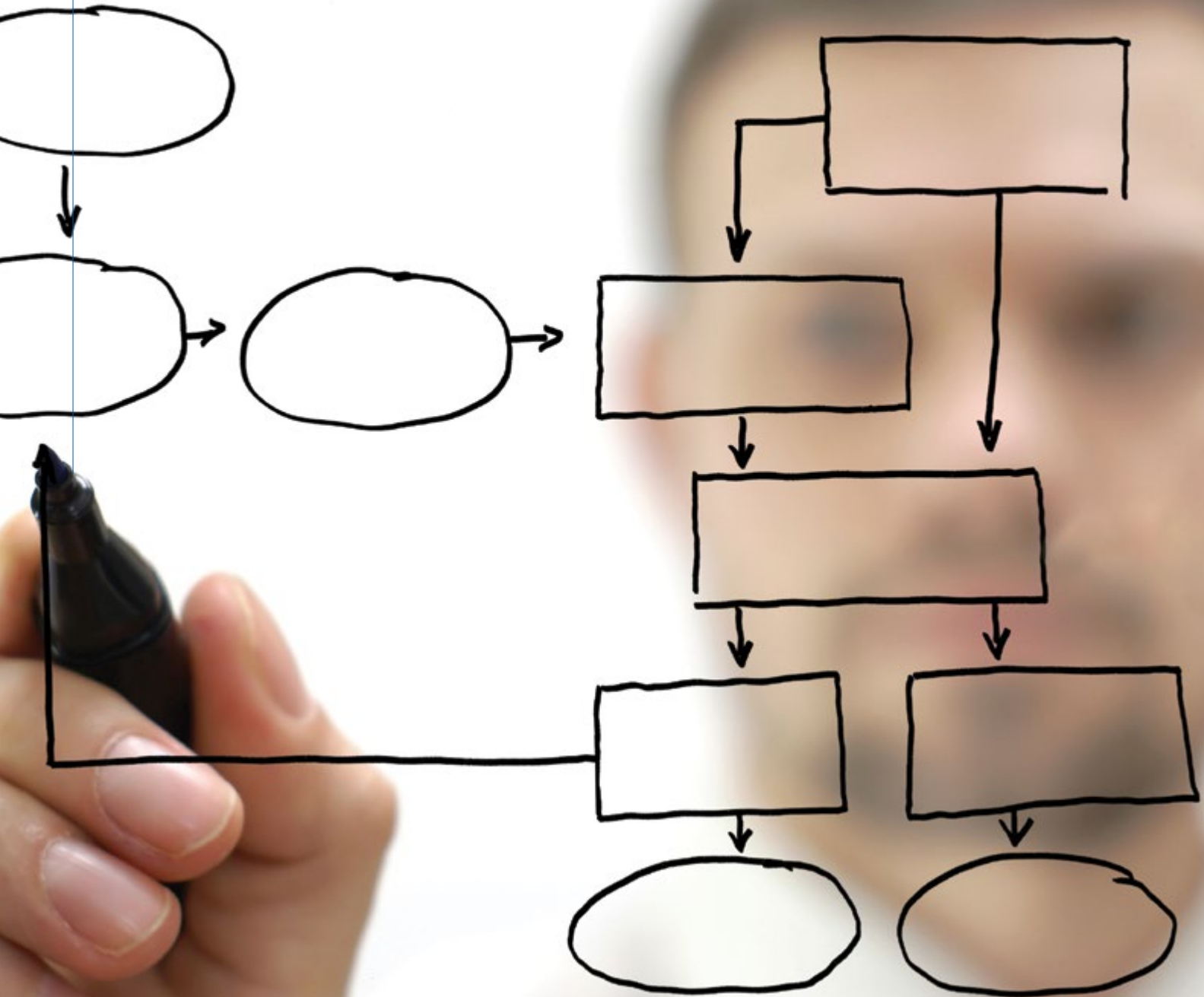
### Potential Evaluation Targets

- ① Participation
- ① Participant Satisfaction
- ① Behavioral Changes
- ① Biometric Measures



# RESEARCH vs. EVALUATION

From where we sit, research is the based on any given intervention. program based on findings and f



an attempt to **prove** a hypothesis or demonstrate an outcome. On the other hand, evaluation is the desire to **improve** your feedback. And there's a world of difference between the two.

### 3. I'm Not Sure What I Should Be Evaluating

This is a huge reason why wellness practitioners don't evaluate outcomes. But, it's important to understand that evaluation is not a mystical process reserved only for the genetically superior. Rather, it's a matter of understanding that there are simple and straightforward evaluation targets that should be considered in the overall context of things.

For example, the lion's share of wellness programs in the United States would do very well in understanding and embracing four simple and straightforward evaluation targets: participation, participant satisfaction, behavioral changes, and biometric measures. By simply understanding these four targets, worksite wellness practitioners have at their disposal a powerful frame of reference for creating an effective evaluation process within their organizations.

### 2. Resources Are Scarce

We're getting much closer to the real reason why practitioners don't routinely evaluate program outcomes. Plain and simple, evaluating worksite wellness programs require resources and, without them, conducting an effective evaluation is very difficult. But the interesting thing is that in order to effectively evaluate your program, you need to think about how much it's going to cost well in advance of executing the evaluation itself. This requires a lot of thought, dialogue, and input if you expect to be successful.

According to experts like Dr. Ron Goetzel, practitioners should earmark about 20% of their overall budget for evaluating outcomes. This is where most workplace wellness practitioners miss the boat. In fact, in having reviewed hundreds of operating plans over the course of the last 10 years, it's still relatively rare when an evaluation component is built into the overall operating budget. Nevertheless, if you want to effectively evaluate your program, it's important that you set aside resources to do so—and that needs to be done when you submit your budget.

### 1. My Wellness Program Is Not Properly Designed

Bingo! The number one reason why people don't evaluate their wellness initiatives—and it's a great one—is that their programs are poorly designed. In fact, when programs are not properly designed to include such components as data collection, the development of an operating plan (including goals and objectives), and the delivery and support of well-designed interventions, evaluation is a foregone conclusion.

For example, if you don't write S.M.A.R.T. goals and objectives upfront, it's virtually impossible to evaluate any outcomes at all. And by S.M.A.R.T., we mean goals and objectives that are specific, measurable, achievable, realistic, and time-sensitive.

Perhaps the most unfortunate thing we see on a regular basis is that practitioners have a sincere desire to evaluate outcomes, but their programs simply have not been properly designed to do so. As a result, it's virtually impossible to look for any outcomes that may have occurred as a result of programming efforts. In moving forward, the smart money is on this: Build your programs using the seven benchmarks so that when it comes time to evaluate, you'll experience few or no problems and you'll have a lot of fun in the process.

### Summary

In this article, we've addressed our Top 10 reasons why practitioners don't evaluate outcomes. As a result, we hope that you will examine each of the reasons carefully and take corrective action to overcome any obstacles that are keeping you from effectively evaluating your workplace wellness initiative. ★

**Dr. David Hunnicutt** is the President of the Wellness Council of America. As a leader in the field of health promotion, his vision has led to the creation of numerous publications designed to link health promotion objectives to business outcomes.



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# The Fundamentals of Evaluation

Why, What, How, & You Should Evaluate Your Wellness



on

When  
Program

By David Hunnicutt, PhD



**E**VALUATION NEED NOT BE A COMPLICATED PROCESS. But in order to effectively and competently evaluate your worksite wellness initiative, you'll need to have some basic information. In this article, we'll present the fundamentals of evaluation. Specifically, we'll focus on why, what, how, and when you should evaluate your wellness program.

## Why?

There are several important reasons why you should evaluate your worksite wellness program—we've included some of the most important ones below.

### To obtain feedback so that you can improve your programming efforts

The first—and primary—reason you should evaluate your worksite wellness program is to obtain the information that you will need to improve your present programming efforts. Indeed, by regularly and consistently evaluating your wellness initiative, you'll gather feedback and results from participants so that you can make essential modifications and upgrades to your existing programs. Without evaluation data, it's unlikely that your program will make meaningful advances.

### To demonstrate the value of your program

The second reason why it's important that you evaluate your wellness initiative is so that you can demonstrate the value of your program and the contribution that it's making to the organization as a whole. By collecting and tabulating evaluation data from the various parts of your program, you will be

in a much better position to make important postulations as to how well your programs are working and what the magnitude of the impact is.

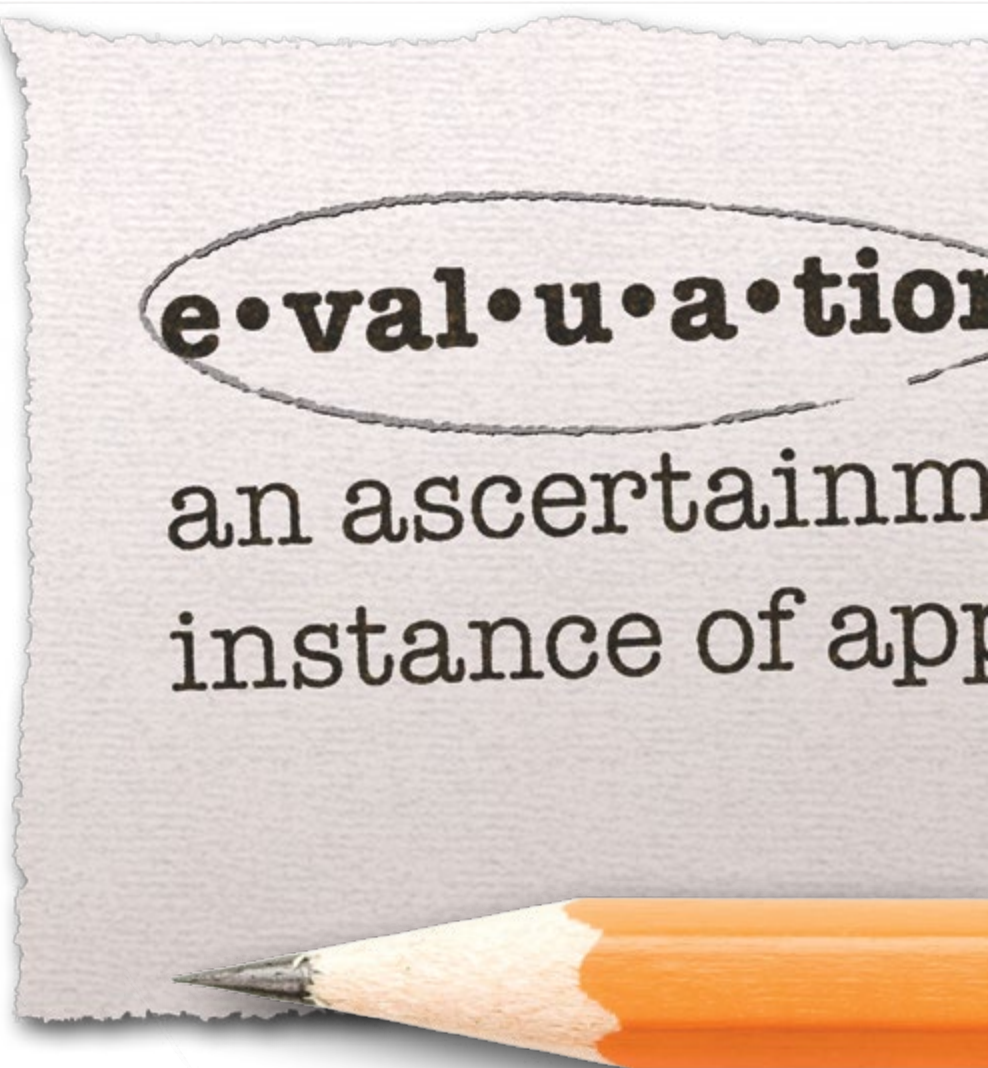
### To measure change

Yet another reason why evaluation is important is that it will help you to measure how much change is actually occurring. And, if there's anything we've learned over the course of the last 10 years, it's that having this data at your disposal will be worth its weight in gold. In fact, if you can have comparison data at your fingertips that quantifies participation rates, overall satisfaction, and changes in behavior and biometric measures,

you will be in an excellent position to promote (and perhaps even defend) your program throughout the organization as a whole.

### To secure continued funding

In tough economic times, funding for health promotion programs is always in question. And, come to think of it, funds for health promotion programs can even be hard to come by when times are good. Given this reality, it's essential that you've got good evaluation data to rely on when it comes to making the case for justifying your proposed budget. Armed with solid





**n** (əˌvɒlyooʊˈɑːʃən) noun  
 ent of a value; an act or  
 praising or assessing

evaluation data, practitioners have routinely told us that the funding process is relatively straightforward. However, without this data, the road to obtaining funding can be a long, arduous, grueling, and painful one.

### To establish accountability

The business buzzwords these days include efficiency, effectiveness, and accountability. And don't kid yourself, just because you are overseeing a wellness program doesn't mean that you are exempt from these concepts. If anything, you may be under even more intense scrutiny simply because health promotion programs are still relatively new to

the corporate environment. With this in mind, you'd be wise to pay particular attention to carefully evaluating your programs so that you will be able to step up when it comes time to account for what you've been doing with your resources.

### To compare the efficacy of different interventions

A final reason you should consider evaluating your wellness program is so that you can compare the efficacy of different interventions. In fact, it's not uncommon for practitioners to try new and different programs and approaches each year. But the best of the best practitioners never throw

the baby out with the bathwater—that is, they are always testing and comparing different programs against the present standard. For example, let's say that you offer an eight week on-site weight management program to all of your employees. After the completion of the program, you are able to assess the changes that occurred over that period of time. In looking forward, you have an inclination that offering this type of program on-line might be easier and less labor intensive for everyone. By having data from both interventions, you will be able to compare the efficacy of both approaches to see which one works best.



# What?

Having addressed the “Why’s” of evaluation, it’s now time to turn our attention to the question of, “What should I be evaluating anyway?”

## Participation

An initial evaluation target is participation. While this may not seem like a big deal, believe me when I tell you that it is. In fact, participation should be the logical starting point for any wellness evaluation. Why is evaluating participation so important? Because people vote with their feet—that is, if they don’t like the programs you are offering, they’ll walk—and they may not ever come back. With this reality firmly entrenched in your mind, it’s relatively easy to see how participation rates can be one of the great revealers of how engaged your population really is.

## Participant satisfaction

Another potential evaluation target is participant satisfaction. A close cousin of participation, participant satisfaction rates are important to assess because they will reveal how much people like your program offerings. The important thing to understand about assessing satisfaction levels is that not everyone is going to be doing cartwheels over your offerings. But this may be even more important feedback than those who love what you are doing. Indeed, if you give people the chance to tee-off on your program offerings, most will take full advantage of it—and the feedback you’ll get will be phenomenal. Just remember this mantra—don’t take the feedback personally, just take it seriously.

## Changes in behavior and health practices

As we progress to higher-level evaluation targets, it’s important that we spend some time discussing capturing changes in behavior and personal health practices. Most certainly, these targets should be considered essential and non-negotiable by all wellness practitioners. But here’s the catch, sometimes changes in behavior and health practices can be hard to detect—but that shouldn’t deter you from trying. Indeed, there are a number of tools and instruments that can be very useful in helping you capture this important information (and we’ll identify some of these resources later in this issue) but for now it is suffice to say—everyone who is conducting wellness interventions should be collecting information that quantifies changes in behavior and personal health practices.

## Biometric measures

Biometric measures refer to things like blood pressure, body weight, and cholesterol—and they are all great potential evaluation targets. In fact, some of the most powerful and compelling data you can put forth as a corporate wellness practitioner will be around biometric measures. Imagine the impact you can have on stakeholders when you announce that you have reduced blood pressures

in 30% of program participants. Or that you reduced BMI by 12% in a 16-week weight loss challenge. To be sure, biometric measures are powerful evaluation targets and, thus, should be considered an essential part of an evaluation plan.

## Productivity

Although relatively new, productivity metrics can also make for great evaluation targets. In fact, if you really look closely at the corporate costs of poor health, productivity will dwarf healthcare expenditures by as much as two to one. As a result, productivity measures such as missed work days, time off task, etc. can all help to capture the impact of your program on both employee’s health and well-being as well as the organization as a whole.

## Medical claims

A final potential evaluation target we’d like to set forward is an analysis of medical claims. And while it’s unreasonable to think that health promotion can have a huge impact on all claims, it is essential to understand that about 25-40% of all claims are potentially modifiable—and thus avoidable. By conducting an analysis of the organization’s potentially modifiable healthcare costs, a wellness practitioner can make a significant contribution to advancing organizational goals.

# Potential Evaluation Targets





ood Pressure

Body Weight

Cholesterol



# How?

Perhaps the greatest challenge for worksite health promotion practitioners is operationalizing the evaluation component of their health initiatives. In this section, we'll outline some concrete ideas as to how important evaluation data can be captured.

## Program registration sheets

One rudimentary, but important, way of capturing evaluation data is through program registration sheets. Although often overlooked, program registration logs can capture a wealth of information including not only participation rates but a variety of other important information as well. And what's perhaps best about the

information contained in program registration sheets is that it can be compared across programs and over years. As a result, program registration sheets—whether electronic or hard copy—should be used every time for every program.

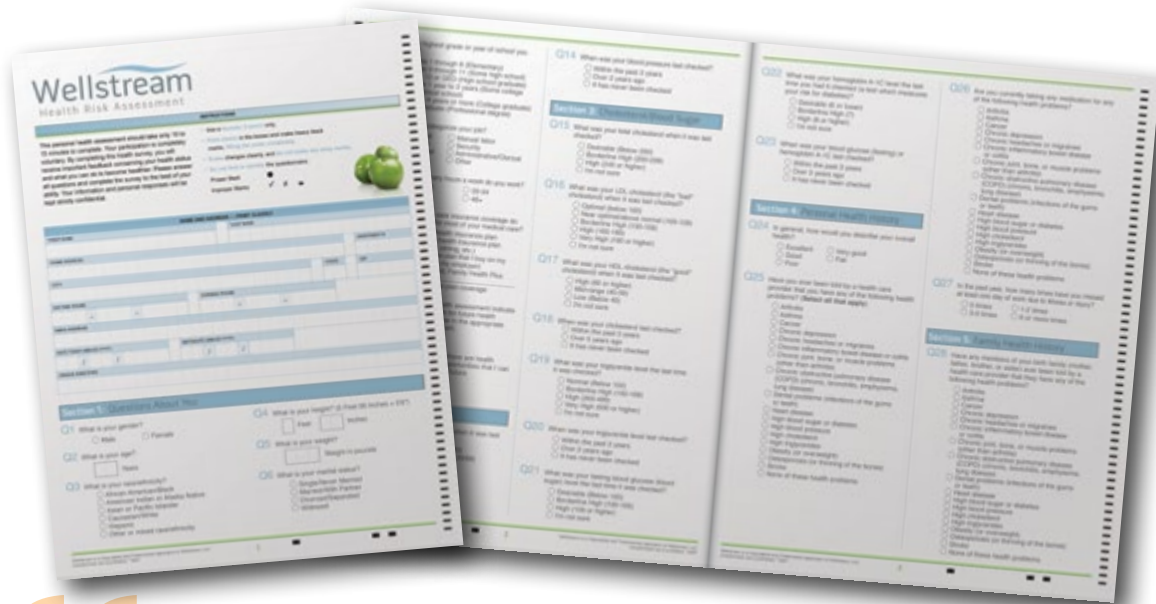
## Participant satisfaction surveys—mid and post

In addition to program registration data, it's important to gather participant satisfaction levels and this can be done through program satisfaction surveys. With repeated prompting, many health promotion practitioners are now using such surveys at the completion of their offerings. And while this is a step in the right direction, we would also encourage the use of satisfaction surveys at the midpoint of your programs as well. This will provide

you with timely data that can be incorporated as the program is actually being completed. There are a number of participant satisfaction surveys in the public domain including those listed on WELCOA's InfoPoint.

## Self-reported behavior surveys

Although self-reported behavior surveys have gotten a bad rap by some hard-core researchers, they are in fact an excellent vehicle for capturing preliminary behavior-change data. Indeed, self-reported behavior-change surveys can provide the practitioner with useful data that can be monitored over time. When using self-reported behavior surveys, you may want to consider incorporating “stages of change” information as well. This is particularly useful because it will



“Through advancements in technology, it is relatively straightforward to **monitor, track,** and **compare** an individual’s HRA results and biometric changes across time periods.”



allow you to track individuals as they move from non-compliant to engaged and motivated participants.

## HRA results, biometric testing, screening results

With HRA data and biometric testing results, we are moving into a more sophisticated level of evaluation. And, years ago, analyzing this data would have been complicated and cumbersome to say the least. However, through advancements in technology, it is relatively straightforward to monitor, track, and compare an individual's HRA results and biometric changes across time periods. There are a variety of quality health risk appraisals on the market today. In addition, there are variety of reputable providers of health screening services.

## Productivity questionnaires

This is a new entrant into the worksite wellness evaluation arena—and it should be taken seriously. As we mentioned earlier, productivity loss costs will be much larger than healthcare expenditures. To capture changes in organizational productivity, it's important to use quality assessment tools. Fortunately, there are several available that can help you to do this and we'll examine them in a later article.

## Medical claims comparison

A final but important target is a comprehensive medical claims comparison. Although it sounds daunting, it need not be an overwhelming task. Specifically, there are consultants and software packages that allow you to enter medical claims information data and compare it against previous year's

data. The information obtained will capture how the organization's modifiable healthcare expenditures have changed over time. Obviously this is a much more sophisticated analysis and many health promotion practitioners will be wise to use outside "expert" resources in order to complete this task successfully.

# When?

The final area to be addressed in the fundamentals of evaluation is the notion of "when." In this section, we'll provide some potential timeframes in which your evaluation efforts should be conducted.

## Ongoing

There are some components of the evaluation process that should be done on an ongoing basis. Specifically, participation should be monitored and tracked using registration protocols and participant satisfaction should be captured using paper and pencil and/or electronic instruments. What's particularly important in capturing participation and participant satisfaction data is, at least for the first several years, it should be done on an "all the time" basis. In so doing, you'll find that you will better understand the constituents that you serve and in the process significantly improve the overall quality of your programs.

## Annual

With respect to annual evaluation efforts, it's important to ensure that things like personal health assessments/health risk appraisals are offered at least once every 12 months. While you may not have the budgets in place to do so right now, we encourage you to embrace this challenge and work hard to secure


enough funding so that a health risk appraisal can be provided each year. In addition, you may want to consider conducting an annual health fair that includes individual health screening and at the same time administer an annual wellness interest survey. By gathering this information on an annual basis, you will be taking important steps in developing longitudinal trends that can be monitored over time.


## Bi-annually

Finally, there are some evaluation components that can be tracked every two years or so. This would include a modifiable medical claims analysis and an organizational health and productivity audit. The reason that these areas should be evaluated every 24 months is that they represent much larger data sets that don't change that frequently and that dramatically from one year to the next.

## Summary

In this article, we have examined the why, what, how, and when of evaluating worksite health promotion initiatives. Although there is certainly much more that can be said about effective evaluation protocols and procedures, it is our hope that this article provided you with a ground-floor orientation to the fundamentals of workplace wellness evaluation. ★

 **Dr. David Hunnicutt** is the President of the Wellness Council of America. As a leader in the field of health promotion, his vision has led to the creation of numerous publications designed to link health promotion objectives to business outcomes.

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# Communit EV

By  
David Hunnicutt, PhD



# Communicating Your Evaluation Results

How To Make Your  
Findings Stick

Slide 1 of 10



**T**HESE DAYS EVERYBODY TALKS ABOUT THE “STICKINESS” FACTOR. Without going too deep, “stickiness” is the notion of getting your information noticed—especially in a world where there’s already way too much information floating around as it is. In this article, we’ll put forth some useful tips to help you get the most out of your evaluation results.

### **Sticky Tip #1: Keep It Simple**

This is gospel when it comes to making information sticky. Plain and simple, people are not attracted to things they can’t understand—and that means if people can’t figure out your evaluation results, you are pretty much dead in the water. If you want to get the most out of your evaluation findings, make sure that the information is accurate AND concise AND easy-to-understand. Your reports should be brief. Your PowerPoint presentations should be straightforward. Your graphs should be simple and easy-to-understand. Your discussions need to be frank and to the point. Avoid “lengthy” like the plague—keep things simple.

But what if people want to dig deeper? That’s when you give them the working papers behind the report. Logistically, it’s an easy thing to do. Simply gather all of the background documents—aggregate reports, data analyses, etc. and place them in a three-ring binder. Simple stuff. But remember to make sure you remember who you loan the working papers to—it’s a pain to have to reformat this information a second time.

### **Sticky Tip #2: Use Pictures**

It’s been said that a picture is worth a thousand words—and when it comes to stickiness, it’s absolutely true. Pictures have a powerful and pleasing effect on the brain—instinctively, we all know this is true. If you doubt this tip, simply think back to the last time you sat through a presentation with PowerPoint slides filled with to the brim with text and numbers. Boring, boring, BORING—and definitely not sticky. So, if you want your message to stick, use pictures and images.

But before moving on, it’s important to advise you that the images that you use should be relevant and consistent with the topic. For example, I recently sat through a presentation where the presenter shared the case study and

outcomes of his worksite wellness program and he used “the journey” as his metaphor. By incorporating beautiful images of different aspects of a journey, his point was very well-received by everyone in attendance.

### **Sticky Tip #3: Tell Stories**

Stories entertain. Stories captivate. Stories get passed on. Tell stories. This is a big, big advantage in making your message stick. For example, imagine the practitioner who talks to her senior management about how her programs reduced cholesterol by 30% among program participants. Then she goes on to explain the powerful effect that this reduction can have physiologically on the human anatomy—good stuff, but it could be a whole lot better.

Now imagine the same practitioner actually uses one of the program’s participants as a testimonial. She proudly shares that without this kind of intervention, the individual may have been severely compromised or even disabled in the future—and the devastating impact that could have had on their family. And then after telling this heartwarming story, she actually brings the individual into the room and allows the person to add some color commentary.

The bottom line is this: stories stick. Use them—a lot.

### **Sticky Tip #4: Never Have More Than One Main Point**

When you present your evaluation data, you have to keep it to ONE major point and/or conclusion. Why is this important? Because people can remember one thing—maybe two—but they can’t (and won’t) remember 10 major points. Make no mistake about it: distilling your findings down into one major point is hard work—you have to know your results inside and out in order to come up with one main point—and that’s exactly why most health promotion practitioners don’t deliver messages that stick.

And if you don’t buy into the “one major point” recommendation, remember this: It’s insensitive to have 10 major points in a presentation—nothing will suck the oxygen out of a room faster than someone who throws out a PowerPoint presentation that’s got 10 bulleted items on a single slide.

Oh, and by the way, here is the ultimate test. If you can’t make your point in the length of time that you have in an elevator ride from the first floor to the second, you’re not ready to pull the trigger yet.





“If you really want people to engage in your presentation, be sure to **ask questions** that begin with **“why,” “how,”** and **“what”**—and avoid questions that start with **“do,” “did,”** and **“are.”**”

### Sticky Tip #5: Invite Feedback

The best way to engage an audience is by inviting them to make their opinions, thoughts, and reactions known. For seasoned practitioners, this is something that they do every single time with and with every single group.

But what’s the best way to engage your stakeholders in discussing your evaluation results? Ask questions!

By asking questions, you are letting your audience know that you want and value their input. And this is where it’s nice to know the right questions to ask. If you really want people to engage in your presentation, be sure to ask questions that begin with “why,” “how,” and “what”—and avoid questions that start with “do,” “did,” and “are.”

The reason that this is important is that why, how and what questions generally require a more in-depth answer. For example, “How did the results strike you?” or “What are your overall reactions?” If you ask questions like these—people have to engage. Now, on the other hand, if you ask questions like, “Did that make sense?” or “Are you comfortable with this data?” you’ll get one word answers and that makes for some very uncomfortable and unsatisfying interactions.

### Bonus Sticky Tip: Poke Holes!

If you follow the previously mentioned five sticky tips, you’ll greatly increase your chances of success. Remember,

your goal is to get your message across and have others make sense of it—and even embrace it.

But here’s one more for the road. If you want your message to stick—have your closest colleagues poke holes in it before you start communicating with others. By poking holes we mean having your closest friends start giving you feedback on your information—and the more intense and the more radically honest the feedback, the better off you’ll be.

### Summary

In this article, we’ve presented 5 important tips to help you get your evaluation results to take hold in the organization. We’re convinced—and successful practitioners will support us on this—that if you follow these tips, you’ll greatly increase your chance of successfully advancing the cause of health and well-being throughout your organization. ★

**Dr. David Hunnicutt** is the President of the Wellness Council of America. As a leader in the field of health promotion, his vision has led to the creation of numerous publications designed to link health promotion objectives to business outcomes.



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# More Than Just NUMBERS

Nation's Leading Expert Speaks Out  
On The Art And Science Of Evaluating  
Worksite Wellness Programs





In this exclusive WELCOA interview, Dr. Steve Aldana, one of the nation's leading experts on workplace wellness evaluation recently sat down with WELCOA President Dr. David Hunnicutt to talk about the art and science of measuring the impact and outcomes of worksite health promotion initiatives.

### Why do most people struggle with evaluating their worksite wellness programs?

**Aldana:** I think the major reason that people struggle in evaluating their worksite wellness programs is because they're not really trained in how to do this. You have to remember that health promotion programs are still a relatively new phenomenon at the workplace. And, when you're talking about evaluating complex health behavior change initiatives, it almost requires that you have some sort of academic background or professional orientation in this area. But the good news is this: most of the programs in this country are very straightforward and that means that pretty much anybody is qualified to evaluate the impact and outcomes. Sure it's a different story for those companies who have put in place a rigorous evaluation design, but that's a very, very small portion of the programs that exist today.

### What kind of outcomes should be evaluated in most worksite wellness programs?

**Aldana:** This is a good question. What's most important here is that practitioners think of it in terms of a logical progression. And that means starting with the basics like participation rates and overall satisfaction. When you start here, you're laying an excellent foundation for building a really solid worksite wellness program. I mean, think about it. If you're going to have healthier employees, you've got to make sure that they take part in your programs. That's why it's important that you start with participation rates. And then when you have lots of people participating it's very important that you make sure that they're engaged. And that's where satisfaction measures come into play. When you start with those basic targets, you're really moving in a logical progression.

As you can see, it really all starts with participation. And, if you're not reaching your employee population, the rest of the story is really irrelevant.

Once you've secured solid participation rates, then it's time to start thinking about documenting behavior change, and that can be done through health screenings and health risk appraisals.

### What's the typical timeframe to put a solid evaluation component into place?

**Aldana:** It could take three to four years to really get everything into place. If you concentrate on building participation and monitoring overall satisfaction levels in year one, then you're ready to start examining health behavior changes in years two and three. Then, once you've secured solid participation rates and you've successfully integrated health risk appraisals into the mix, you're in a great position to begin calculating



the return-on-investment. But that whole process can take two, three, or even four years to put into place.

I'd like to mention here that it's really essential that worksite wellness practitioners NOT try to rush the process. To successfully integrate worksite wellness—and evaluation—into the fabric of the organization, you've got to give it some time. I've seen organizations that try to calculate return-on-investment after 12 months and it can really get ugly because they're trying to force outcomes—and when it comes to human behavior—you just can't do that.

It's also important to mention that you don't have to evaluate everything all at once. I'm familiar with a lot of organizations that have built wonderful programs, but they only schedule in a formal evaluation process about every 24 months. Indeed, when I look at the inner workings of their programs, it's clear to me that they've done a great job in documenting participation rates,

monitoring satisfaction levels, and gathering behavioral information through the administration of health risk appraisals. But because of their commitment to keeping the main thing the main thing—that is, they really focus on providing solid interventions—they only evaluate outcomes every other year. But the reason their program works is because they're committed to collecting the data and its right at their fingertips when they want to analyze it.

### What's your feeling on using self-reported behavior change measurements?

**Aldana:** Here's a newsflash. Most behavior change is going to be self-reported. The only way it's not is if you're in some type of clinical trial and that just doesn't happen very often. Take for example, nutrition. Again, unless you're in some kind of clinical trial where you're being fed

specific food everyday and you don't have an option on what you're going to eat, any behavioral feedback we gather is going to be self-reported. Moreover, all physical activity data is self-reported—that is unless you live in a cave and there are a couple of researchers watching you all day.

Some people will point to nicotine and make the argument that, because you can measure blood levels from nicotine, self-reported behavior change measurements are not the best way to go. I whole-heartedly disagree. When you start analyzing body fluids to determine whether your employees are using tobacco, I think we've moved from health promotion and entered the arena of big brother. I think some of the best programs in the country are completely comfortable with using self-reported measures to monitor tobacco usage rates, and I think that's a wise way to go.



The important thing to understand about behavior change is that the reporting measures are not perfect. And, in order to make them perfect, we'd have to be very invasive with our employees. I don't think we want to go there.

Now, are there other companies that have a vested interest in doing that? Sure. For example, just look at a lot of insurance companies. They want to know what your health behaviors are—and they're going to use clinical measures to accurately capture them—because they've got a financial stake in the equation. I'm not sure that we need to go to that extreme with employee health promotion programs.

### **Good point. But what about health screenings? Don't they look at clinical risk factors like cholesterol and blood sugar?**

**Aldana:** They do. But remember that things like cholesterol and blood sugar are going to vary greatly within a 24-48 hour period. In fact, it's not uncommon for someone's cholesterol to experience significant changes during the course of the day. So even if you're using clinical data, it's still not going to be perfect.

And that's a very important point for every practitioner to understand. As someone who has evaluated more worksite wellness programs than perhaps anyone else in the country, it's important that practitioners not get too caught up in trying to come up with perfect evaluation measures. In fact, what I suggest is exactly the progression protocol that I mentioned previously.

### **So what you're saying is that it's hard, if not impossible, to gather perfect data.**

**Aldana:** There's no measure that is absolutely, clinically perfect. Like I said before, even a clinical measure of blood cholesterol is going to fluctuate 10 to 20 to 30 points on any given day. So people think, "Well, I got clinical data." I'm here to tell you that even clinical data is a little bit mushy. That's why they do blood pressure repeatedly to get the trend over time.

The same kind of logic applies to an HRA as well. No HRA is going to be perfect. However, if you build trust levels among your employees, most of the people who take it are going to answer truthfully. But there are always going to be those who will fudge their answers. That's why it's important to generate large participation rates so that you can get better data that's not as influenced by those who don't answer truthfully.

The bottom line on data collection is that you're going to have less than perfect data. But that shouldn't hold you back.

### **How much time during the course of a year should the typical practitioner set aside for evaluation?**

**Aldana:** This will be a shocker—not very much. After 20 years in the field, I feel like I have to reiterate the point that it's still much more important to spend the vast majority of your time on conducting effective behavior change programs and then working evaluation in around that.

Because interventions are the things that change behaviors, practitioners really need to focus the majority of their efforts on developing and delivering good programs. It pains me when I run across practitioners who spend 50% of their time on evaluation. When I see this happen, I have to sit back and wonder if their employees are really getting the attention that they need and deserve.

Specifically, if you can do some evaluation, obviously, participation and HRA kinds of things, great; we're talking 2-5% of your total pie. It shouldn't be very much because if you've paid attention to building your program properly you will already have had written good goals and objectives up front and that will make the process very straightforward. But remember, health promotion programming is all about behavior change, and if you want to change behaviors, you have to have good interventions.

### **If you could give advice to the typical wellness practitioner about evaluation what would you tell them?**

**Aldana:** The big companies—the big players, 5,000 employees or more—are geared up to do very aggressive, academic-type evaluation... which I think is great. But that's just not the reality for 99% of all the other worksites out there. Thus, for those practitioners leading those programs, I would tell them that evaluation is nothing more than quantifying where you are today as compared to where you started from.

At its most basic, evaluation is nothing more than a before and after story. So take any one



individual in your wellness program that has transformed their lives. You ask yourself where they were when they started, and where are they now—eight weeks, six months, or two years later. That in essence is an evaluation. Now, when you think about evaluating your overall program, you just have to think about all of the people that participated in your initiative and capture where they started from and where they are today. It's as simple and as hard as that.

Evaluation need not be a hard thing to understand and it need not be complicated or intimidating. I believe that 99% of the people who are leading worksite wellness programs today have the sufficient ability and expertise to conduct solid evaluation protocols.

And here's one additional tip and it's a great one. If you're a practitioner of a wellness program, don't get too caught up in the numbers. The "numbers" are people, and that's where the story is. If you really want to have an impact on your CEO forget about the PowerPoint slides with frequencies and t-tests and instead invite the people who have benefited from your program to come in and share their stories. That's where evaluation is made real. Because what your employees are saying is "Here's where I was, and here's where I'm at now." That's far more powerful than any evaluation summary report you could ever write. ★

“At its most basic, evaluation is nothing more than a before and after story.”



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# RESOURCES at the Ready

## Evaluation-Friendly Books, Manuals, and Tools

### Measuring Employee Productivity: A Guide to Self-Assessment Tools

**Resource Type:** Manual | **Organization:** IHPM  
**Website:** [www.ihpm.org/publications/](http://www.ihpm.org/publications/)

#### Overview:

*Measuring Employee Productivity: A guide to self-assessment tools* has been written to help employers, providers, consultants, and researchers measure the amount of worker productivity lost due to illness or injury.

Successful businesses know that their organizations' achievement is directly related to worker performance, which is directly related to worker health. *Measuring Employee Productivity* will prove invaluable in quantifying the value of employee's health to the bottom line.

#### What Does *Measuring Employee Productivity* Cover?

Until now, there has been no resource describing health

and productivity measurement tools. *Measuring Employee Productivity* provides a detailed description of seven health-assessment tools (questionnaires used by employees to rate their own performance). These tools have been, or are currently being, used in a research setting to study work performance and the effects of health on productivity. The guidebook provides:

- ▶ Help in choosing the right self-assessment tool for your objectives.
- ▶ Specific productivity factors measured by each self-assessment tool.
- ▶ Information about the degree to which each tool has been tested for reliability and validity.
- ▶ Actual tools (questionnaires) and instructions for use.

Specifically, *Measuring Employee Productivity* will help you:

- ▶ Determine the impact of health issues on your worker's performance.
- ▶ Compare the impact of different health issues on worker performance.
- ▶ Identify areas of opportunity for health interventions.
- ▶ Assess the potential productivity gains from alternative health improvement strategies.
- ▶ Create a business case for investing in employee health.





## CalcuL8™

**Resource Type:** Health & Productivity Cost Analysis

**Developers:** Joseph Leutzinger PhD & David Chenoweth PhD

**Organization:** Health Improvement Solutions

**Website:** [www.healthimprovementsolutions.com/products-services/calcul8.php](http://www.healthimprovementsolutions.com/products-services/calcul8.php)

### Overview:

CalcuL8™ was co-developed by Drs. Joseph Leutzinger and David Chenoweth. It is an innovative medical claims analysis tool which assists organizations in identifying their most costly lifestyle-related risk factors that are modifiable and preventable. Additionally, CalcuL8™ identifies productivity loss costs associated with these risk factors. CalcuL8™ projects future healthcare-related costs for the company and provides break-even analysis scenarios and return-on-investment projections for interventions related to the company's eight most costly lifestyle-related risk factors.

### Specifically, CalcuL8™

- ▶ Identifies health care costs that are modifiable and preventable through health management and wellness programs.
- ▶ Provides scenarios based off the company's data that can be used to determine breakeven analysis and eventually return-on-investment projections.
- ▶ Eliminates the guesswork and delivers results-oriented and field-tested strategies, based on hard science, to help your organization reduce future healthcare costs.
- ▶ Provides you with the capabilities to predict and plan how specific interventions will impact employee behavior and health-related costs.

## How To Evaluate Workplace Health Promotion Programs

**Resource Type:** Workbook

**Authors:** Ron Goetzel, PhD & Ronald Ozminkowski, PhD

**Organization:** American Journal of Health Promotion

**Website:** [http://healthpromotionjournal.com/mm5/merchant.mvc?Screen=PROD&Store\\_Code=AJHP&Product\\_Code=WBHowtoEvaluate&Category\\_Code=TB](http://healthpromotionjournal.com/mm5/merchant.mvc?Screen=PROD&Store_Code=AJHP&Product_Code=WBHowtoEvaluate&Category_Code=TB)

### Overview:

This workbook provides the reader a hands-on guide for developing a plan to evaluate health promotion programs. Written by two leading names in health promotion, Ron Z. Goetzel, Ph.D. and Ronald J. Ozminkowski, Ph.D., this workbook is a must in the library for every health promotion professional.

This workbook provides a look at the following key questions for evaluating health promotion programs:

- ▶ Why should programs be evaluated?
- ▶ Can results be generalized from one program to another?
- ▶ Why do health promotion programs fail?
- ▶ Are there arguments against program evaluations?
- ▶ What should be evaluated?
- ▶ How is agreement on program objectives achieved?
- ▶ Should the focus be on a few or many success measures?
- ▶ What are the basic questions of research?



## Health Promotion in the Workplace

**Resource Type:** Book

**Author:** Michael O'Donnell, PhD, MBA, MPH

**Organization:** American Journal of Health Promotion

**Website:** [http://healthpromotionjournal.com/mm5/merchant.mvc?Screen=PROD&Store\\_Code=AJHP&Product\\_Code=TXHealthPromotioninWorkplace&Category\\_Code=TB](http://healthpromotionjournal.com/mm5/merchant.mvc?Screen=PROD&Store_Code=AJHP&Product_Code=TXHealthPromotioninWorkplace&Category_Code=TB)

### Overview:

This extensively revised and updated third edition of *Health Promotion in the Workplace* offers readers a framework for studying workplace health promotion, while at the same time reviewing the significant conclusions that have been reached in this exciting field over the last decade.

*Health Promotion in the Workplace* includes:

#### Health Promotion Concept

1. Health Effects of Health Promotion
2. Employers' Financial Perspective on Workplace Health Promotion

#### Program Management

3. Design of Workplace Health Promotion Programs
4. Program Management of Workplace Health Promotion Programs
5. Program Evaluation

#### Strategies

6. Awareness Strategies
7. Theoretically-Based Strategies for Health Behavior Change
8. Building Supportive Cultural Environments

#### Interventions

9. Health Assessment
10. Physical Activity in the Workplace
11. Worksite Nutrition Programs
12. Worksite Weight Management
13. Tobacco Control and Cessation
14. Medical Self-Care
15. Stress Management
16. Employee Assistance Programs
17. Social Health in the Workplace

#### Perspectives

18. Workplace Health Promotion in Small Business
19. Aging and Worksite Health Promotion
20. Global Perspectives in Workplace Health Promotion
21. Connecting the Workplace to the Community
22. The Future of Workplace Health Promotion

## Evaluating Worksite Health Promotion 2<sup>nd</sup> Edition

**Resource Type:** Book

**Author:** David Chenoweth, PhD

**Organization:** American Journal of Health Promotion

**Website:** [http://ww5.aitSAFE.com/cf/add.cfm?userid=7268236&product=\[9780736060417\]+Evaluating+Worksite+Health+Promotion&price=52.00&units=1&return=www.exrx.net/store.html](http://ww5.aitSAFE.com/cf/add.cfm?userid=7268236&product=[9780736060417]+Evaluating+Worksite+Health+Promotion&price=52.00&units=1&return=www.exrx.net/store.html)

### Overview:

Worksite Health Promotion has been fully updated and expanded with valuable new information and user-friendly learning aids. Now in its second edition, the book continues to be the ideal reference for aspiring and practicing health professionals who want to promote the health of employees and organization.

Like its predecessor, the second edition ties together the theoretical concepts of health promotion and their everyday applications and presents a step-by-step approach to planning, implementing, and evaluating programs in a variety of settings. With a broad overview of worksite health promotion and the major events in history that have stimulated it, the book enables readers to understand the role of these programs in increasing productivity and controlling health care costs.

Readers will find more ideas than ever for planning and launching worksite programs. The text includes new sections on programming for small and multi-site companies, electronic health management communication tools, using the stages of change framework with programming incentives, medical self-care, health and productivity management, and disability management as a component of an integrated health data-management system.

In addition, professionals using this second edition will discover the rationale and gain more justification for setting up worksite health programs. They will learn how to tailor a worksite health program to the mission, philosophy, and vision of their organizations, glean ideas for addressing specific health concerns, and examine how to design an operating plan as well as report results to major stakeholders.



Drawing on more than 25 years of academic and private consulting experience, Dr. Chenoweth includes numerous case studies to demonstrate how successful programs are conducted at small, medium, and large worksites around the world. In addition, he has enhanced the text with new assessments to help readers determine employees' needs and interests, including a personal health questionnaire, environmental checksheet, healthy worksite assessment, and overall assessment of economic evaluations. With this resource, readers will have a full-spectrum view of today's cutting-edge principles and applications of worksite health promotion.

## Program Evaluation: A Key To Wellness Program Survival


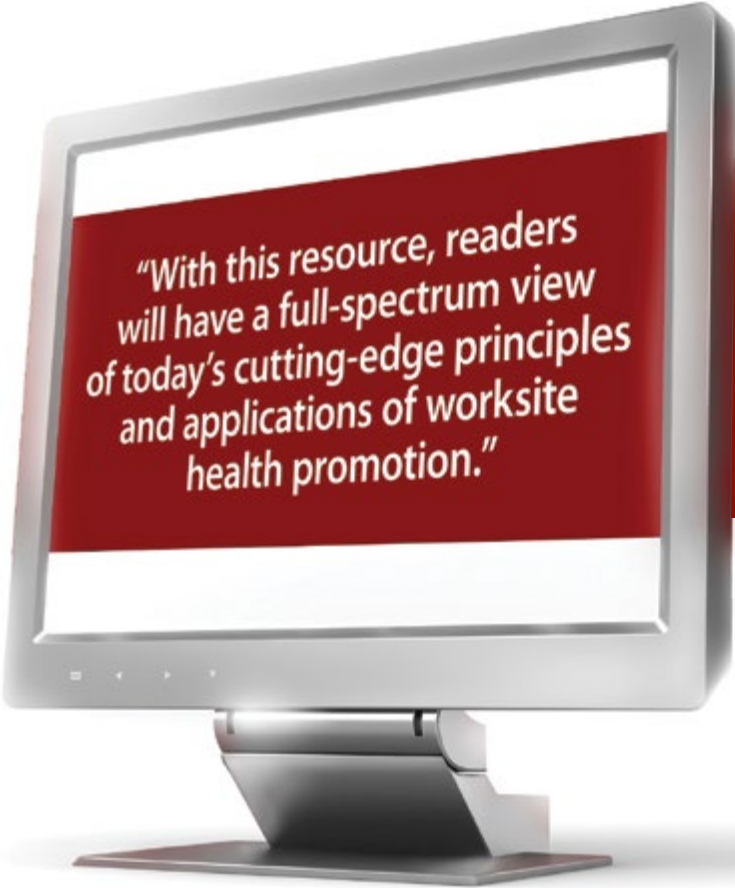
**Resource Type:** Manual

**Author:** Larry Chapman, MPH

**Phone:** 206.364.3448

### Overview:

This guide has everything you need to plan and organize an evaluation of your worksite wellness program, including sample evaluation forms, graphic evaluation samples, evaluation focus group exercises, tabular data examples, and an overall sample evaluation strategy and framework for your wellness program. A well designed program evaluation can be a costly undertaking and few worksite wellness programs have direct funding for evaluation in their budget. However, with careful planning it is possible to design an internal evaluation system using the techniques covered in this book; they can take you a long way toward documenting the results of your program. ★

"With this resource, readers will have a full-spectrum view of today's cutting-edge principles and applications of worksite health promotion."



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# The Well Workplace Checklist

## Evaluating Outcomes

For more information, log on to WELCOA's InfoPoint website:



**The Well Workplace Checklist**—a copyrighted and trademarked tool of WELCOA—is an interactive assessment that will help you determine how your organization is doing with respect

to worksite wellness. To complete the online assessment, you'll need to log on to *InfoPoint*—WELCOA's members only website. Once there, the Checklist should take you about 20 minutes to finalize. Once you are finished, you will be able to download a short report outlining your overall scores. Shortly thereafter, a full report will be emailed directly to you.

To assess your evaluation of outcomes, we encourage you to answer the following eight questions. If you're interested in getting a score and a response to these questions, be sure to log on to *InfoPoint*—WELCOA's members only website—and take the Well Workplace Checklist in its entirety. In so doing, you will receive a set of scores for each of the seven benchmarks as well as a customized, in-depth report on your company's overall wellness efforts.

- 1 **Our organization regularly tracks participation.**  
 Yes                       No
- 2 **Our organization monitors participant satisfaction.**  
 Yes                       No
- 3 **Our organization documents improvements in knowledge, attitudes, skills, and behaviors.**  
 Yes                       No
- 4 **Our organization assesses changes in biometric measures. (e.g., body weight, strength, flexibility, cholesterol levels, blood pressure, etc.)**  
 Yes                       No
- 5 **Our organization assesses and monitors the health status of "at-risk" employees.**  
 Yes                       No
- 6 **Our organization measures changes in both the physical and cultural environment. (e.g., policies, benefits, working conditions, etc.)**  
 Yes                       No
- 7 **Our organization monitors the impact of wellness on key productivity indicators. (e.g. absenteeism, turnover, morale, etc.)**  
 Yes                       No
- 8 **Our organization analyzes cost effectiveness, cost savings, and return on investment.**  
 Yes                       No

## About The Wellness Council of America [WELCOA]



Based in Omaha, Nebraska, WELCOA was founded in 1987 as a national non-profit membership organization dedicated to promoting healthier life styles for all Americans, especially through health promotion initiatives at the worksite. Organizationally, WELCOA serves as an umbrella, linking communities and coalitions together into a supportive network that includes locally affiliated Wellness Councils, Well City initiatives, Well Workplaces, and individual and corporate members throughout the United States.

**Working Well**—Specifically, WELCOA focuses on building Well Workplaces—organizations that are dedicated to the health of their employees. The Well Workplace process provides business leaders and members with a structure or blue print to help their organizations build results-oriented wellness programs. Ultimately these programs help employees make better lifestyle choices, and positively impact the organization's bottom line. To date, over 700 companies have received the prestigious Well Workplace award. In addition, nine cities have been designated as Well Cities—Jacksonville, FL; Omaha, NE; Chattanooga, TN; Hobart, IN; Lincoln, NE; Kearney, NE; Kanawha Valley, WV; and Gainesville, FL and Bangor, ME—while several other cities have made the commitment to join this exclusive group.

**Leading Edge Wellness Information**—In addition to helping organizations build structurally sound wellness programs, WELCOA serves as a national clearinghouse and information center on worksite wellness. WELCOA responds to thousands of requests for information and materials by publishing a number of source books, a monthly health and wellness newsletter, an extensive line of brochures, as well as conducting numerous training seminars.

### Wellness Council of America [WELCOA]

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# WELCOA's Seven Benchmarks of Success

For the past 20 years, the Wellness Councils of America has dedicated its efforts to studying and promoting the efforts of America's Healthiest Companies. During that period, WELCOA developed its patented Well Workplace process. At the core of the Well Workplace model, we have identified seven key benchmarks of success.

Specifically, these seven benchmarks are inherent in companies that have built results-oriented workplace wellness programs.

## **Benchmark #1: Capturing CEO Support**

From our experience, CEO support is essential to the process of developing best-in-class programs. Indeed, we know of very few programs that have contained costs and improved employee health that don't have strong senior level support.

## **Benchmark #2: Creating Cohesive Wellness Teams**

Once CEO support has been captured, the next task is to create a cohesive wellness team. Teams are essential to building great wellness programs because they help to distribute the responsibility for wellness throughout the organization.

## **Benchmark #3: Collecting Data To Drive Health Efforts**

The team's first and primary responsibility is not to start offering programs, but rather to step back and gather important data. The data will be collected using corporate culture audits, health risk appraisals, and knowledge and interest surveys. This data is extremely important because it will reveal the specific areas of health needs and interests within the organization.

## **Benchmark #4: Carefully Crafting An Operating Plan**

With essential forms of data having been collected, the task is now to develop an operating plan for health and wellness within the organization. This operating plan will serve as the roadmap and will guide the company's efforts and investments in workplace wellness.

## **Benchmark #5: Choosing Appropriate Interventions**

With the first four benchmarks completed, it is now appropriate to begin choosing and implementing the appropriate health and productivity interventions. These interventions will most likely include tobacco cessation, physical activity, weight management, self-care, and stress management. But, they also may include things like fatigue management and ergonomics—depending on what the company's data reveals.

## **Benchmark #6: Creating A Supportive Environment**

Once the appropriate health promoting interventions are up and running, it's time to create a supportive environment. Indeed, by having a supportive environment, organizations can be confident that employees will be supported in their efforts to lead healthier lives. Environmental interventions may take the form of policies, physical modifications, and rewards and incentives.

## **Benchmark #7: Carefully Evaluating Outcomes**

The seventh and final benchmark in the Well Workplace model is carefully evaluating outcomes. It is within this benchmark that companies will religiously keep score when it comes to their wellness program. Evaluation targets include things like participation, participant satisfaction, behavior modification, and cost containment.

# Wellstream

## Health Risk Assessment

### WELCOA's Online Health Risk Assessment

The Wellness Council of America, one of the nation's premier resources for workplace health promotion, is proud to introduce *Wellstream*. *Wellstream* is an innovative, user-friendly health risk assessment. This powerful online tool will help your employees to assess and monitor their personal health status. More importantly, *Wellstream*—through its aggregate reporting function—will allow you as an employer to decipher important organizational health trends and introduce the appropriate health management interventions.

### Wellstream Is More Than Just An HRA

With more than two decades in the business of worksite wellness, WELCOA can help you set up an aggressive and effective communication campaign and incentives to drive up participation. So when you purchase *Wellstream*, you'll get much more than just an online assessment...you'll get a partner who is committed to helping you succeed.

### Wellstream Can Be Customized

If you're looking for a custom tool, we can help you create a look and feel that's uniquely your own. From adding your logo to complete customization, *Wellstream* can fit any desire.

### Wellstream Is Affordable And Cost Effective

When choosing a health risk assessment, cost is always a factor. That's why we've chosen to price *Wellstream* competitively. In fact, you'll find that *Wellstream* is perhaps the most cost effective HRA in the industry. Please contact a *Wellstream* representative at **402.827.3590** or send an email to **info@wellstreamonline.com** to inquire about custom pricing.

### Contact Wellstream Today for Your Price Quote

Phone: 402.827.3590

Email: [info@wellstreamonline.com](mailto:info@wellstreamonline.com)

Web: [www.getwellstream.com](http://www.getwellstream.com)



# Carefully Evaluating Outcomes

## Developing Results-Oriented Wellness Programs One Company At A Time



In this issue of *Absolute Advantage*, we're addressing the topic of program evaluation. The last of the seven benchmarks, *Carefully Evaluating Outcomes*, this issue will address the importance of evaluation and some practical approaches to help you get the job done.

Specifically, we've divided the issue into four main sections. Initially, we'll present the Top Ten reasons why most wellness practitioners fail to evaluate outcomes. Next, we'll turn our attention to providing an overview of evaluation fundamentals. Appropriately titled, *The Fundamentals of Evaluation*, this article will address the why, what, how, and when of the evaluation process.

Having laid the groundwork by establishing the reasons for evaluating programs as well as the fundamentals for getting the job done, we turn our attention to the art and science of communicating the results to stakeholders and other interested parties within the organization.

Finally, we've consulted with one of the nation's most respected and talented evaluation experts—Dr. Steve Aldana. In this exclusive interview, Dr. Aldana shares his expertise and experience in the evaluation arena—you'll find this interview compelling and valuable.

We hope you enjoy this issue of *Absolute Advantage*.

Yours in good health,

Dr. David Hunnicutt  
President

## Top Ten Reasons...

Evaluation is one of those topics that strike fear into the hearts of worksite wellness practitioners. And over the years, we've come across dozens and dozens of the best excuses as to why practitioners don't evaluate their worksite wellness initiatives.

Here's our Top 10 list of the major reasons why people don't evaluate their worksite wellness programs.



### 12 The Fundamentals of Evaluation

Evaluation need not be a complicated process. But in order to effectively and competently evaluate your worksite wellness initiative, you'll need to have some basic information. In this article, we'll present the fundamentals of evaluation.



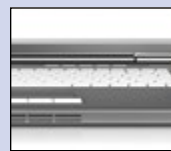
### 20 Communicating Your Evaluation Results

These days everybody talks about the "stickiness" factor—a concept that can help you greatly, especially when it comes to communicating your evaluation results. In this article, we'll put forth some useful tips to make sure that your evaluation results are taken seriously.



### 24 More Than Just Numbers

In this exclusive WELCOA interview, Dr. Steve Aldana, one of the nation's leading experts on workplace wellness evaluation recently sat down with WELCOA President Dr. David Hunnicutt to talk about the art and science of measuring the impact and outcomes of worksite health promotion initiatives.



### 30 Resources At The Ready

To help you identify top-notch workplace wellness resources, we've created a short list of books, manuals, and tools that you can't live without.