

WELCOA's 7 Benchmarks
Benchmark #7: Carefully Evaluating Outcomes

The Fundamentals Of Evaluation

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

By David Hunnicutt, PhD



WELCOA (The Wellness Council of America) is one of the nation's most-respected resources for building high-performing, healthy workplaces. Over its 25+ year history, WELCOA has perfected its patented Well Workplace protocol which is the key to developing, delivering, and sustaining a healthy corporate culture. Whether you are a workplace wellness practitioner, human resources professional, business leader, or consultant/broker, WELCOA's tools, trainings, and resources will help you better promote organizational well-being and, at the same time, contain escalating health care costs.

THE MISSION

Transforming organizations into high-performing cultures by improving the health and well-being of their employees.

FAST FACTS

- » WELCOA was founded 30 years ago as a resource for building and sustaining results-oriented workplace wellness programs.
- » The WELCOA Nation is the largest network of health promotion professionals in the world made up of over 5,000 Member organizations, 30,000 subscribers and followers, and millions of employees around the globe.
- » More than 1,000 organizations have achieved WELCOA's Bronze, Silver, Gold, Platinum or Small Business Well Workplace Award status.
- » WELCOA has certified over 1,500 health promotion professionals in all 50 states and 5 countries.

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Introduction

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. 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 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.

e•val•u•a•tion (əˌvæljuoʊˈāshən) noun
an ascertainment of a value; an act or
instance of appraising or assessing



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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.

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

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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 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. ★