Work health and wellbeing
Strengthen your business

Evaluation report template

This template can be branded and changed to suit your organisation

An evaluation report provides your audience (e.g. supervisors, senior managers) with an update on how your work health and wellbeing strategy is progressing, what has been delivered, the outcomes achieved and recommendations for the future.

Keeping senior management informed about the outcomes of the work health and wellbeing program can assist in gaining additional support, funding and momentum.

The report should address your evaluation questions in an unbiased way and be written in a format suitable for your audience. Avoid using personal or identifiable information or data and always seek permission from the individual(s) (e.g. testimonials, case studies or photographs).

How to use this template

There are headings to help structure your evaluation report. They are a guide only and can be changed or modified as needed.

Provide information under the relevant headings that you have collected from sources such as the key motivators reporting tool, healthy workers survey, healthy workplace audit tool, small business discussion tool and other monitoring documents or observational data you may have used.

The grey coloured boxes provide suggestions for sources of information you may like to include.

Refer to the **Work health and wellbeing toolkit** for tools, templates and resources for planning, delivering and evaluating a work health and wellbeing program, including:

- Business case template
- Policy template
- Key motivators reporting tool
- Small business discussion tool
- Health workers survey and healthy workplace audit tool

- Work health and wellbeing interventions
- Review intervention tool
- Action plan template
- Evaluation fact sheet
- Example initial or baseline and longer-term evaluation reports

Work health and wellbeing evaluation report

Organisation: name of organisation

Worksite: which location/site of the organisation included in this report e.g. regional office or work areas or staff

Date:

Executive summary

Include a summary about:

- what was being targeted and why (e.g. key motivators/chronic disease risk factors/business strategy)
- what has been implemented/delivered
- key results and recommendations.

This section is usually populated when you have completed the other areas of the report and is a summary of the key information you want to convey.

Overview / background

Provide information about:

- the aim/purpose of the work health and wellbeing strategy
- who was/is involved
- the methodology used – what tools you used to gather your baseline information, monitor and evaluate (e.g. pre and post surveys, verbal discussions, observations etc)
- any organisational strategic documents aligned with your work health and wellbeing strategy.

Sources of information may include:

- key motivators reporting tool
- business case
- organisational plans
- approval documentation
- methods you used to collect data such as consultation with workers and management, surveys and audit tools.

Actions / activities undertaken

Provide information about:

- the work health and wellbeing strategy timeline
- interventions/activities undertaken and what has been completed.

Sources of information include:

- healthy workplace audit tool
- healthy workers survey
- small business discussion tool
- action plan
- review intervention tool.

Discussion / analysis of results

Analyse current information and use outcome data from previous progress reports to provide information about the following:

- What the information collected throughout your strategy tells you – did you achieve or partially achieve your aims/objectives? Compare pre and post results, comparison to benchmarks (internal/external) or previous work health and wellbeing strategies you may have implemented.

- Data collected from worker surveys/consultation or workplace audits conducted.

- Measures of success including participation numbers, sessions delivered, photos of work environment changes, policies implemented or reviewed, launch events etc.

- What measurements you have analysed (e.g. if you measured worker time (hours) spent sitting or fruit and vegetables consumed etc).

- What has worked well and why (if known).

- What could be improved and why (if known).

- Considerations about the information presented (e.g. limitations, challenges or additional organisational context).

Business outcomes

If you can, provide data on relevant business outcomes for the report period, especially if your program is integrated into your health and safety or HR systems and management.

A more detailed evaluation report (for example after three years of implementation) will address longer term sustainable business outcomes related to:

- changes in the physical environment

- changes in the cultural environment (e.g. management support, worker engagement, morale)

- changes to organisational systems

- organisational outcomes (e.g. rates of absenteeism, injuries, workers' compensation claims, return on investment)

- changes in worker health status over the long term.

Sources of information include:

- key motivators reporting tool

- healthy workplace audit tool

- healthy workers survey

- small business discussion tool

- other business systems (e.g. human resources, safety management and workers' compensation data)

- informal feedback from workers and management

- workplace champion reflections

- focus groups or interviews.

Key learnings

Provide a summary of learnings that can be considered for future work health and wellbeing strategies and activities.

Use information from previous sections to address and consider the above.

Recommendations

Provide information to senior managers on what the next steps should be and the resources required. (Use active words at the beginning of the sentence e.g. continue, provide, approve).

You can include information such as:

- next steps—what needs to be done, who needs to be involved?
- what you need/resources required to continue and improve your work health and wellbeing strategy
- strategy timeline expectations (future report dates and future implementation dates).