

## Evaluation Worksheets: Getting Started

As you prepare to implement your planned actions to improve the psychological health and safety of your workplace, it's important to decide upon your evaluation strategy. The bottom-line question is: "How will we know whether these actions have made a difference?" Or, put another way, "How will we know whether our investment (in time, effort and money) paid off?" These are evaluation questions.

Effective evaluation is:

- **Practical:** clearly relevant to your goals for the process, straightforward and simple to carry out, and cost-effective
- **Flexible:** adaptable to your particular workplace and available resources
- **Continuous:** uses an ongoing quality improvement approach in which feedback is provided over time to modify and improve the intervention

### Step 1: Decide the Purposes of the Evaluation

The basic evaluation question ("How will we know whether these actions have made a difference?") is deceptively simple. There are many *differences* that may be of particular interest to the employer or the Action Team, and many reasons for doing an evaluation.

These reasons may include a commitment to:

- **Accountability** (demonstrating to leadership or a funding body that promised results were obtained and resources used appropriately)
- **Quality Improvement** (committing to an ongoing process of enhanced quality)
- **Examination of Specific Outcomes** (tracking the accomplishment or at least initiation of specific changes identified as priorities by the Action Team)
- **Cost Effectiveness** (conducting a sophisticated analysis of outcomes in relation to the financial resources needed to accomplish them)
- **Uptake** (determining the extent to which employees or other target groups know about and implement the planned actions)
- **Fidelity** (determining whether actions were implemented by the appropriate staff in a manner consistent with the Action Plan)
- **Sustainability** (forecasting the degree to which these interventions can feasibly be maintained over the long term)

The Action Team should identify the purposes of the evaluation before initiating the Action Plan. This way, your team will have a clear and useful answer when you implement an action to improve psychological health and safety and people ask, "Did it work?"

## Step 2: Identify Key People to Provide Input into the Evaluation – your Evaluation Team

Ensuring a high level of involvement by important stakeholders creates a sense of ownership of the project. Relevant stakeholders might include: corporate decision-makers, supervisory staff with responsibility for carrying out the planned action(s), union representatives, occupational health staff and front-line employees who may be the target of the planned action(s).

## Step 3: Make a List of Short-term and Long-term Outcomes to Measure

Change takes time. If you focus only on long-term outcomes, you may become discouraged. In addition to setting your long-term goals, identify desired short-term outcomes. Short-term outcomes provide rapid feedback on the impact of the Action Plan, and are typically easier to measure. If the short-term outcomes look positive, communicating this throughout the organization or team will improve overall morale and commitment to the process of improving psychological health and safety.

## Step 4: Collect Short-term Outcome Results

Your Evaluation Team will need to decide what represents a meaningful short-term time span. This might involve doing outcome measurement (e.g., at the 3 or 6 month mark) after carrying out the planned action(s). Or, if you've taken on an ambitious plan to modify organizational culture so as to increase tolerance and support for employees having mental health difficulties, then short-term might be 1-2 years.

1. A simple and effective way to gather information about short-term results is to re-do the **Organizational Review**, asking yourself whether the **Organizational Review Results** now look more positive in light of the actions you have undertaken. Are you seeing the changes you expected? For example, are there meaningful changes in the current psychological health and safety policies for your workplace; are staff aware of changes in these policies; have accommodation guidelines for staff returning after absence related to mental health problems been clarified; have there been improvements in access to appropriate mental health care; has there been an appropriate level of participation by staff in training initiatives related to psychological health and safety?
2. Another approach to evaluating short-term outcomes is to re-administer the **Survey** either to the whole workforce or to a subgroup of employees seen as high priority on the basis of the **Survey Results**. For example, this might involve employees working in a particular department who had low scores on the **Survey** or who have demonstrated performance and morale problems. **Note: Re-administering the Survey to a subgroup of employees is only possible if you originally administered the Survey in a manner that allowed data from different branches or departments to be identified separately.**
3. Yet another approach to evaluating short-term outcomes is to gather *qualitative data* by conducting focus groups with key supervisory or front-line staff. This can be a powerful way to assess changes in Psychosocial Factors, providing a safe forum for employees to discuss changes they've observed in crucial areas. It is important to ensure that focus groups address the particular Psychosocial Factors identified in the **Organizational Review Results** and/or the **Survey Results**. Pay attention to indicators of positive change in psychological health and safety (e.g., improved understanding of mental health issues, improved team collaboration, positive feedback from clients/customers). **Research shows that the process of engaging employees in positive change is very powerful in itself and can lead to the outcomes you desire for your organization.**

### **Step 5: Use the Short-term Outcome Evaluation Results to Modify your Action Plan**

The short-term outcome evaluation results provide important information, telling you which parts of your Action Plan seem to be working well (and perhaps should be enhanced) and which parts don't seem to be reaching their objectives and should therefore be significantly modified. It's best to know at an early stage which aspects of the Action Plan are effective and which aren't. Identifying barriers early on allows you to take corrective action in a timely manner. This quality improvement approach is well established in current organizational practice.

### **Step 6: Collect Long-term Outcome Results**

After a few cycles of short-term outcome evaluation and action improvement, it's a good idea to assemble your Action Team and other key stakeholders in order to reach an overall judgment on how well your Action Plan is working. This is a good time to examine some longer-term outcomes (e.g., decreased absenteeism, decreased rate or duration of mental health disability leaves, increased retention, etc.). Remember that change takes time. Also, remember to celebrate successes along the way, no matter how small they are!