

Monitoring and evaluating

05

Introduction

Revisiting a number of key constructs, this chapter aims to suggest how wellbeing initiatives can be monitored and evaluated, reviewing examples from practice and placing them in the context of valid and robust research to strengthen their appeal. We provide professional advice on what to look out for, how frequently to evaluate, and the importance of these processes in systematically reviewing your people strategy.

Being open to challenge can be difficult, but we argue that workplace environments that permit periodic review will benefit enormously in terms of staff engagement and wellbeing. We start by looking at the key advantages of strategy setting, and what this can do for your organization. Taking a journey through the key elements, we discuss the strategic importance of goal setting in any business, and how that links in with your mission, vision and values.

Constructing a strategy is important, and it must cohere. That is to say, that it enables the right hand of your business to effectively communicate and interact with the left; something that is not always apparent.

We then move on to the all-important measurement of wellbeing, what that looks like and how it can inform any interventions or business changes you may consider making. Of course, these may originate from what you have garnered while doing these exercises. We have already discussed the pitfalls that measurement can bring, so this is more of a good practice example, written in a positive frame.

This chapter then explores effectiveness and efficiency. After all, that is the aim of all this collectively. This will also illustrate the key

role that wellbeing plays in these areas of business. We then look at performance and productivity, linking academic research that will hopefully convince you that the outcomes of a well-considered and executed wellbeing strategy will pay dividends, making your organization a better place to be.

The focus then moves on to ethics, one of the cornerstones, and origins, of meaning and purpose in working life. The chapter concludes with a discussion about evaluation. This is all-important – knowing that you are going along the right lines, creating your own evidence of success, and making meaningful changes for the benefit of your workforce based on what you have learnt. This growth mindset is where you should aspire to be. Having a learning culture, not seeking blame, but business improvement, should be the aim. We suggest this will impact on all the aforementioned, and firmly place your organization in a great place; a place where people want to work and where you accommodate meaning, purpose, happiness and prosperity.

Strategy

We have already stated the criticality of ensuring that your wellbeing strategy sits firmly within an organization's general working premise. We have recommended that fact-finding exercises are conducted to ensure the strategy adds meaning and purpose within your organization, these being the key tenets of wellbeing. Furthermore, the majority of research suggests this is optimum in terms of outcome. The engagement with and dissemination to your workforce is equally as important, to reiterate key text on this: 'Deciding strategy is only one step; strategic decisions need to be communicated' (Johnson, Scholes and Whittington, 2008: 574). Furthermore, 'middle managers in particular are likely to be key since they are often tasked with making senior management plans' (Balogun, 2007: 81).

We also consider the importance of annual strategy reviews as it is good practice to look at wellbeing periodically in terms of best fit. Change in organizations is very often the status quo. What we are suggesting is that if there are big changes in size, policy, procedure, management changes and so on, a recap and communication of the

wellbeing strategy should also be included as best practice. To quote the great Henry Mintzberg, ‘Companies must remake themselves into places of engagement, where people are committed to one another and their enterprise’ (2009: 140). Not forgetting, ‘for every new strategy, there should be a communications strategy to match’ (Johnson, Scholes and Whittington, 2008: 574). We will discuss performance later in this chapter, but productivity and performance are some of the key outcomes for an effective wellbeing approach.

Goals

It is most likely no surprise that any organization needs a set of goals, and in terms of wellbeing this should be no different. What is probably not as apparent is how these fit in with the overall strategic direction; where you want to get to, so to speak. We will discuss mission and vision shortly, but first the actionable goals. Goals must be, at some point at least, achievable. Setting outlandish or entirely aspirational goals is not particularly useful when set in the context of wellbeing. For example, goals such as eradicating all ill health and suchlike are unlikely ever to be realized, and employees soon become alert to this and thus they are not valued or aspired to. There is also the point of mixing up goals with the mission and values and, though often confusing, they are – or should be – different things. So, the goals when laying out your wellbeing plans should be set around making life at work as good as it can be, or not doing things that would compromise an employee’s health and wellbeing. We acknowledge that in some countries health and safety legislates for this. Also, be careful not to have too many goals in relation to wellbeing. You want to avoid this being a list, if at all possible.

Under the goals, which should be a simple statement, there ought to be objectives outlining specifically how you intend to achieve this. The goals and objectives, as well as being achievable, should also be measurable. That is, how do you know when you have achieved them? What does success look like? With the end in mind, this should steer you in decision making about your goal setting. It is also important to keep in mind why you are actually doing whatever it is. Will these ‘things’ help the organization in some way? As well as the

company being profitable, does it maintain responsibility for what it does (often referred to as corporate social responsibility)? The bottom line is that you should take care in defining your goals, and ensure they are both actionable and achievable.

Monitoring the goals is relatively straightforward. The objectives set to deliver the goals should be drafted with enough detail to allow for the checking of progress against them. In the same manner, the evaluation of goals should be relatively simple. Asking questions such as to what extent have they been achieved, or are on track? Having such structures in place is not only good business management, but it also allows for detailed progress reporting when required. This makes life easy (less stressful) for all, and ought to be adopted as best practice.

Vision

An organization's vision can be slightly more creative when it comes to wellbeing: phrases like world class and industry leading may spring to mind. This statement describes, in essence, where the organization sees its own future. What it will be, what it will be seen as by others. The vision statement may include aspirational references, or the road map, as some refer to it. As we referred to in goals, a vision statement is a relatively short sentence, typically about 3–30 words long. A further point to be made is that a vision normally stays in place for a number of years, unlike goals, which can be refreshed more periodically. This usually coincides with the mid-to long-term strategy, and helps to articulate as such. It could also work in developing a strategic focus, which again sets out a few aspirational headlines. As such, the vision should articulate more than just a catchy slogan for the organization's posters and website. It should be considered and authentic.

A wellbeing strategy has the aim of improving the physical, psychological and social health of employees, so a vision statement could be carved out of this, in terms of the wellbeing strategy. So, maybe it may outline what the direction is internally, via management styles, what this means for users, or customers of the organization, and what that means for the profitability or sustainability of the organization.

Mission

A mission statement normally involves some sort of narrative to detail how you might achieve your goals, including the aspirations of the vision to achieve this through aligning people with the purpose of the business. Although these all seem like flowery terms, the structures are actually useful in constructing both the strategy that people work for and the narrative ordering of how to describe what it is you are actually doing, and where you are trying to get to. This is very important in terms of clarity, mission clarity if you wish, and also engagement with your workforce. When we look at what a workforce values in terms of its leaders, a clear sense of direction is often prioritized. This should align with strategic capabilities, so is not too aspirational and can be realistically achieved by the workforce.

Values

When we consider values, these can be split into personal and organizational, with definitions including the notion that values are the key to effective wellbeing, providing a framework for ethics or the principles by which we work. We say notion because values do not really lend themselves to being a descriptive list, but something more personally intrinsic. Shalom Schwartz, creator of the theory of basic human values, described personal values as, ‘concepts or beliefs that relate to desirable end-states or behaviours, transcend specific situations, guide selection or evaluation of behaviour and events, and are ordered by relative importance’ (1996: 4).

An important point here is that when looking at values we are not really talking about the monetary worth but more the psychological boundaries within which we work. These include looking at what we hold dear, what is important to the organization, and so on. The purpose of an organization can be strengthened by strong values and these should be articulated and embedded, allowing employees to take meaning and purpose from their working life that is congruent with the values they hold. This can often be a tricky dilemma, as you may find this conflicting with making profit or leading in a competitive

market. How far will you have to go to succeed, and will this breach the values you may wish to work within?

When values are compromised, workers will often feel like they are also being compromised. So, how do these acceptable standards of behaviour work into your wellbeing strategy? We strongly recommend that this is a consultative process, and the proposed values are set in conjunction with the workforce. Exercises such as world café conversations or focus groups can be used to explore and discuss organizational and individual values and alignment. The buy-in is essential, as with all strategic decisions.

There are interesting comparisons with corporate social responsibility and how this impacts on a workforce. This is beyond the scope of what we are suggesting here but nevertheless is a fascinating area of work. When organizations take seriously the values they hold, and that of their workforce, the working environment can be improved markedly.

The relationship between values, behaviours and culture, which we have discussed elsewhere in this book, are inextricably linked. The Engage for Success work noted, 'Engaged organizations have strong and authentic values, with clear evidence of trust and fairness based on mutual respect, where two-way promises and commitments, between employers and staff, are understood and fulfilled' (MacLeod and Clarke, 2009). A further related topic is that of ethics, which we discuss below.

Ethics

Closely associated with values are ethics. In fact, most combine the two in strategic documents. Ethics is a branch of moral philosophy, closely associated with doing the right things for the right reasons. It derives from the Greek word *ethikos*, from *ethos*, which means habit or custom. It has also been interpreted as a system of moral principles that govern a person's behaviour or activity. It can be divided into three areas: metaethics, normative ethics and applied ethics. These describe various levels of living a good and moral life, one that has rights and responsibilities at heart. These involve ethical dilemmas,

ethical decision making, amongst other things. Metaethics deal with the history and the origins of ethical principles and moral judgement. What is right and wrong, and dilemmas are dealt with in the area of normative ethics, and we see a lot of organizational training programmes using dilemmas to tease out the basic points of ethics. These form the basis of asking groups of employees to consider various workplace scenarios, perhaps where there is no right or wrong answer, and to debate what the various options are through the lens of ethics. Issues such as bending the rules, or making exceptions for individuals, often form the foundation for such exercises. The main consideration is that, strictly speaking, there is no right or wrong answer, it is the human interaction, and the impact on others that steers the conclusion. Finally, applied ethics takes a look at the big issues, such as the ethics (controversy) of intervening in Iraq, Afghanistan or Syria perhaps.

The bottom line with ethics is that, in terms of the relationship with wellbeing, it is inseparable. Meaning and purpose in life are closely linked to moral philosophy, the ‘why’ as Simon Sinek refers to it. The ethical rules that apply to considering right or wrong almost always cohere with what we consider to be morally good for us or what makes us feel happy, subjectively well – although, on the whole, ethics is usually about the impact on others rather than self-interest. Nevertheless, ethics align as the greater good.

Measurement

There are a number of views on measurement. These are largely in respect of the behaviours that they often drive to achieve a goal. That said, managing wellbeing needs to include measurements, and here we will discuss sensible approaches that can be taken. Generally speaking there are two types of measurement – quantitative and qualitative. Arguments abound as to which is the most effective, including a mixed methods approach. For simplification’s sake we can say that quantitative methods involve numbers, percentages and so on to establish pictures of the landscape, and qualitative involves a descriptive picture, through stories or accounts, for example.

However, very thick text books have been written on the pros and cons, whys and wherefores of these methods, and combinations thereof, and you will soon see that this is a complex area of business, or even a business in itself. If we consider that managing wellbeing could be considered a risk management process, this may assist in looking at proactivity, interventions and indeed different methods to analyse direction and progress. So, identify the areas of wellbeing you intend to focus on, analyse what is known and evaluate or prioritize, look at what you are going to do (the treatment) and your strategy to monitor and review. Overall, ask yourself what benefits is the strategy providing to your employees, and your customers? How are you better off by having this?

To provide further detail, if we consider what we need to measure we can look at what we are going to be doing, what are the risks, what are the benefits, and how we ‘quantify’ these. Once this has been done we now need to decide what our mechanism will be for monitoring these facets. Again, we look to how we ‘quantify’ these. Using instruments such as the stress assessment tool – ASSET – can assist in providing clarity. These break down employees’ attitudes and perceptions on a number of wellbeing issues. Information can also be gleaned via focus groups, interviews with employees, keeping diaries or logs and, of course, traditional sickness data.

One of the issues for organizations is around the length of time between measurements, or if there is a case for constant measurement. This is not straightforward, and we consider this down to the requirements of the organization, though it seems sensible that if there are identified issues, these measurements can be useful to ensure the right approaches are being taken. There are arguments for a continual cycle, and also for incorporating this into routine management practices.

One of the issues with measurement, or assessment of any kind in fact, is that they can cause unintended consequences. These may include resentment, suspicion or issues of trust in employees. They may question why you need to measure – is it that they do not believe what is being said, or what behaviours are manifesting as a result of the measurement? For example, is the treatment changing behaviours, or the fact they are being measured? See, for example, the

Hawthorne Experiments (Mayo, 1946). The way to respond here is to be open, honest, transparent and proactive in the engagement of the workforce. As the saying goes, ‘trust arrives on foot and leaves on horseback’. That is, it may take years to build trust in your workforce, but literally seconds to destroy it. One way to destroy it is to be clumsy with measuring any kind of performance or productivity metric. Therefore, there needs to be an overemphasis that this is required to improve working practice, ensure things in the workplace are improving, and to show a genuine commitment to the workforce. As with other feelings we have mentioned, trust is difficult to quantify (but you will know when you’ve lost it!) and can be difficult to earn. Therefore, a notion of success can be introduced that is gauged through measurement. This framing helps employees to understand and invest in the purpose of metrics in order to allow them to flourish in the workforce, in whatever way they consider that to be.

Other measures that are popular in terms of wellbeing address a host of areas. For measuring personal resilience, you may employ the six-item Brief Resiliency Scale (Smith *et al*, 2008). To measure perceived organizational support, you may use a scale developed by Eisenberger *et al* (1986), which seeks to establish to what extent employees trust that their employer cares about them. The theory being that if they do, the employees are more likely to be more productive and loyal, and as a result a strong psychological contract exists and performance improves. This particular scale, as they are referred to, has 16 items (questions) and probes issues that highlight value at work.

The International Physical Activity Questionnaire (Craig *et al*, 2003) uses 27 questions to ascertain a population’s physical activity levels. It is a popular measure when considering mobilizing an otherwise sedentary workforce, where perhaps the workforce is largely office based and the majority of work is performed sitting at a desk. These question sets can be a prompt for action, engaging with employees and nudging them to think about their physical activity, lifestyle, and how that impacts on their work and private life. This can also have the impact of perceived organizational support (as mentioned in the previous survey), as it brings to the fore notions that the organization cares for their physical, as well as emotional, wellbeing.

We have already mentioned our next survey instrument – ASSET – and it is one we have employed on many occasions to test many different occupations. These organizations were from both the public sector and the private sector and included manufacturing plants, local education authorities, large county councils, police forces, universities, the prison service, and various other service providers. ASSET, which stands for A Shortened Stress Evaluation Tool (Faragher, Cooper and Cartwright, 2004), is a further diagnostic that surveys the workforce and examines the extent to which individuals and groups are affected by stress, identifying at-risk areas and providing a normative data set by which to compare sectors, individuals or groups of people against each other. ASSET uses six areas, referred to as six essentials to probe perceptions about work relationships, work–life balance, workload overload, job security, control, and resources and communications. A further attitudinal question set probes perceived commitment of organization to employees, and perceived commitment of employees to the organization.

We ourselves have used this survey instrument to look at stress in policing, both in the UK and the United States. What this approach effectively does is give you evidence to make the case for interventions, to test interventions, and to evaluate the interventions longitudinally (see for example Hesketh, Cooper and Ivy, 2017). The information that emerges from these surveys is vital to inform good decision making, and to look at improved ways of future working. These take into account organizational, team and individual experiences that can help improve wellbeing strategy. For example, we used ASSET to research the efficacy of resilience training among UK police (Hesketh, Cooper and Ivy, 2018). This subsequently went on to inform national strategy and highlight the criticality of personal resilience within police officers and staff.

In Table 5.1 we have outlined some of the question sets that you may find useful and which have already been validated through their established use in the field of organizational wellbeing and associated topics (of which there are many). That is, you can rely on them to give you valid and reliable results. A final word of caution on this is that surveying properly is a highly skilled profession, with many pitfalls in its own right. We suggest you access professional advice

Table 5.1 Example of wellbeing question sets

Area measured	Name	No of questions
1 Six essentials	ASSET	36
2 Resiliency	Brief Resiliency Scale	6
3 Personal resilience	Connor-Davidson Resilience Scale	25
4 Hardiness	Dispositional Resilience Scale	12
5 Stress	Stress Mindset Questionnaire general	8
6 Resilience	Adverse Childhood Experiences Scale	5
7 Coping	Cope Inventory	13
8 Burnout	Copenhagen Burnout Inventory	7
9 Empathy	Empathy Quotient (short version)	8
10 Presenteeism	Stress-Related Presenteeism Scale	6
11 Life satisfaction	Office of National Statistics	1
12 Happiness	Office of National Statistics	1
13 Anxiety	Office of National Statistics	1
14 Eudaemonia	Office of National Statistics	1
15 Stress	Police Stress Questionnaire and Organizational	PSQ-Op = 20 PSQ-Org = 20
16 Physical activity	International Physical Activity Questionnaire	27
17 Mental health	Psychological subscales	16
18 Trauma	Davidson Trauma Scale	17
19 Wellbeing	Wellbeing Process Questionnaire	33
20 Engagement	Utrecht Work Engagement Questionnaire	9
21 Lifestyle	Fast Alcohol Screening Test Tobacco Use Questionnaire	FAST = 4 TUQ = 9
22 Value at work	Scale of Perceived Organizational Support	16
23 Exercise motivation	Treatment Self-Regulation Questionnaire Perceived Competency Scale	15 4
24 Workability	Work Ability Index	1
25 Personality	Eysenck Personality Questionnaire	60

before embarking on surveying your workforce. This is both to ensure it is done properly and so that you can rely on the results that emerge. This is critical to any subsequent interventions and evaluation you do to remedy issues raised. You may receive many offers of help to formulate surveys and establish baseline information. We suggest, for this piece of work that will be pivotal to all that follows, it is always far better to set out on the right foot. Therefore, getting expert guidance is strongly advised.

Data

This is, or can be, a minefield. With new rules and regulations regularly coming into being, largely reacting to new technologies, this is rarely simple. Two aspects impact: first, is what you want to establish. Second, is if you can legally and ethically capture, store and utilize personal data for these purposes. This needs some serious thought. What you want to avoid is setting up data capture, either a one-off survey, or more periodically automatically captured metrics, to later find out that the practice is illegal or unethical. Both will have a damaging effect on your workforce and organization, both short and long term. There are two types of data, primary and secondary. Primary data is what you capture for a particular purpose, by whatever means. Secondary is when you utilize existing data, for whatever reason. These can be existing work records, right through to online data samples (eg Office of National Statistics). It is important to consider what the data is going to be used for, whatever the source.

The recent changes in (EU) legislation covering all sorts of privacy issues, and largely to combat considerable data intrusions for the purpose of marketing and identity theft, have turned this world into a wasp's nest. The General Data Protection Regulation (GDPR) is a new EU law that came into effect on 25 May 2018 to replace the previous Data Protection Act. It is the biggest overhaul of data protection legislation for over 25 years and introduced new requirements for how organizations process personal data. It is worth spending some time looking at the main concepts of this to map progress that involves some element of collecting and tracking the progress of employers.

There are many websites dedicated to explaining in further detail, and a web search will quickly establish these. In the final chapter of this book we outline the concepts of the GDPR, legislatively, that you need to be concerned with as these may focus your approach.

Effectiveness

Here we discuss effectiveness in terms of wellbeing and wellbeing interventions in organizations. These, occasionally, cannot be easy to establish with any degree of ease, especially in the early days, as often people will question differing approaches to wellbeing. In fact, wellbeing is not a universally accepted set of propositions, it is far more complex than that. As such, creating any sort of gauge of effectiveness can be difficult. However, it is worth persevering with, as the results can be transformational. When people seek work, they are often focused on how the proposed job fits them. They are motivated in a number of ways: money, satisfaction, sense of community service, job fulfilment and so on. People may take on work for any of the above reasons, but if the job does not deliver they may soon start to look elsewhere for a better deal. This may not result in them leaving, by the way, but may result in them withdrawing discretionary effort – the effort they give above and beyond what is asked for, or paid for. This effort is very often the big difference in the organization's bottom line.

Organizational effectiveness seeks ways to ensure, through workforce satisfaction rather than punitive actions, that organizations can take advantage of great working environments where the workforce draw meaning and purpose and therefore willingly give more of themselves towards the organizational aims. Effectiveness should also cohere with the objectives, as Ackoff (1999) observes – effectiveness is evaluated efficiency, which leads very nicely on to our next area.

Efficiency

Although often used together with effectiveness, efficiency has some subtle differences to effectiveness. Efficiency relates to using resources

that are available as effectively as is feasible. This is sometimes viewed through a lens of waste, in terms of both processes as well as materials. What activity do you do that adds no value to your business or its workforce? In terms of wellbeing, employees can be demotivated by work that is bureaucratic or viewed as unnecessary, and therefore a focus on efficiency can be a useful component to measure. Efficiency has the scope to be measured and used within your wellbeing strategy to gauge how much effort, money or other processes are being used in a useful and productive way. For example, organizations may subscribe to medical services, such as employee assistance programmes. What an efficiency measure would help you do is to gauge how many are using the service and if the service is utilized reasonably for the amount you are paying for it. Effectiveness would allow you to assess if the service is worth having, efficiency helps you quantify the use, value for money and to strategically plan.

Productivity

This and the next area – performance – are where the benefits of having really good workplace wellbeing approaches really comes into action. Productivity and performance are always improved when you have an effective wellbeing strategy in place. If you are in the business of manufacturing or selling something, this is usually quite easy to see. If you are in the services sector you may see this through other lenses. In the UK, productivity is one of the issues challenging most companies. The obvious downside to poor productivity is that profits suffer, but also employees themselves suffer, with living standards and quality of life issues also beginning to emerge. We know that people who are healthy, happy and connected at work are more productive. Research from Robertson Cooper found that people with low wellbeing estimated that they were only productive 67 per cent of the time, while those who had high wellbeing were productive at work 87 per cent of the time (2017). In terms of monitoring and evaluation, it is probably better to consider how you are going to establish a means of measuring productivity, bearing in mind all we

have spoken about regarding pitfalls. After all, you do not want to inadvertently reduce productivity by using clumsy measures.

Performance

The general aim of this book describes what we ascribe to performance. That is, the improvement of employee engagement; decrease in staff turnover; reduced sickness absenteeism, presenteeism and leaveism; and a more dedicated and happy workforce. When this is achieved through what is often termed ‘business as usual’ it is undoubtedly indicative of great performance. The workforce will experience meaning and purpose, feel supported and feel their working life is worthwhile. This is no easy feat and being able to describe when you have reached this status quo may be even more difficult. Many assign metrics as to what good performance may look like, how many, how often, how much waste, and so on. Measuring people performance can be quite tricky though. What we have described here are elements of emotional buy-in. Akin to relationships, these may ebb and flow. It is unlikely you will be able to sustain ‘first day in the job’ performance from all employees. But, skilfully crafted, you may get close, and certainly become more efficient.

Happiness

In essence, this is the very point of this book. We subscribe to a happy workforce as delivering on all of the above elements, and here we are not referring to the Prozac leadership descriptors offered by Collinson (2012), where one has positivity beyond the norm. In fact, happiness can involve times of discomfort, the highs and the lows. It seems the key here is that happy people do not disguise negative emotions, they are open and honest, they meet setbacks head on, acknowledge them and push through. This appears congruent with theories around post-traumatic growth – what doesn’t kill you makes you stronger, as they say.

What we are talking about here of course is subjective wellbeing, so wonderfully described by Sonja Lyubomirsky (2013) in her book, *The How of Happiness*. In this she discusses whether it is possible to become happier, the impact of traumatic events and how to be sustainably happy, drawing on some of the work we have already discussed in this book.

For business, happiness is good, and happiness is good for business! However, there is a lot of literature discussing the relationship between wealth and happiness, love and happiness, and inner prosperity and financial wealth. Congruent with research suggesting that the struggle is part of the journey, most wealth-happiness research concludes with the summary ‘up to a point’. We would argue that, like good leadership, inner happiness is brought about by personal outlook, commitment, social interaction and caring, and challenge to achieve goals. In a study of more than 10,000 participants from 48 countries, psychologists Ed Diener, Richard Lucas and Shigehiro Oishi discovered that people from around the world rated happiness as being more important than other highly desirable personal outcomes, such as having meaning in life, becoming rich and getting into heaven (2007). However, a greater sense of meaning in life was found in poorer populations. Happiness has also been linked to better health, improved immunity from disease and higher creativity.

When it comes to measuring and monitoring happiness there are a number of approaches. One sort of knows when the workforce is happy, but rarely is this ‘feeling’ sufficient enough to get to grips with the social sciences favourite as ‘to what extent?’ Fortunately, there are a number of tools to help. Subjective wellbeing, or happiness, has a number of validated questionnaires that you can use to measure just how happy your workforce is. As well as the ONS scale mentioned in Table 5.1 there are other specific happiness scales. Lyubomirsky (mentioned above) and Lepper developed the Subjective Happiness Scale (1999); Diener *et al* (1985) introduced the Satisfaction with Life Scale; there is the Oxford Happiness Inventory (Hills and Argyle, 2002) and the Panas Scale (Watson, Clark and Tellegen, 1988).

Evaluation

One of the key success measures of any wellbeing strategy is gleaned from evaluation. As such, the evaluation needs to be robust and reliable. Arguably it may be a waste of time unless this is so. You may consider the validity of the evaluation dependent on it being carried out independently. However, if done in earnest, an internal evaluation is quite acceptable. We do see organizations forming peer support groups to effectively help each other through evaluation or audit. This can be good practice and worth considering.

So, what should an evaluation contain? For a start you need to know the starting point. This is also important when setting work in motion. Benchmarking the off position is very important and will help you track any improvements. This element involves capturing how people see their work, what the barriers are and what access to resources they have. You can also capture existing data that is held on systems, such as sickness levels, insubordination reports and numerous other metrics that help inform practice. If you measure performance or productivity in any fashion, these should also be captured to assess progress from the start.

As you set your strategy in motion, or any interventions or new ways of working, you should have some prior idea of how you are going to use numerous sources of information to evaluate the efficacy of your approach. We have already spoken in depth about staff surveys, which can be a great way of carrying out evaluation and gap analysis, and in Table 5.1 we have provided some examples of what may be contained in these. You may also look at any funding you may have received to carry out your plans, and any requirements for evaluation specified by these. Very often funding requires before-and-after evaluation by way of audit. This is done to ensure effective spend. You may also view this by how many staff hours are going to be involved in any project delivery, or strategy delivery.

The first steps may be to decide, probably at an executive level, what exactly a good outcome would look like. Then to establish what the inputs, measures and outputs will look like, and describe and document these. You may wish to keep in mind the earlier-mentioned

rules most will operate under in respect of data protection also. The key things you need to ask are, does this approach improve the wellbeing of employees? Does what we are doing reduce sickness and improve productivity? We would suggest that you remain open to the idea that things may change and new things may become effective as your general workforce wellbeing improves. As the various interventions you may want to introduce permeate through your workforce you may want to assess where they have been most effective. Good evaluation can allow you to do this skilfully and with optimum results. Setting outcome measures is a good way to achieve this, for example what you may consider a good outcome is, and then how to look at indicators that will let you know when this seems to be coming into effect. The evaluation is key to this, but you have to set out with this in mind.

Summary

This chapter has been concerned with how wellbeing initiatives can be monitored and evaluated and, where appropriate, we have provided working examples from practice. Combining academic robustness with practice-based pragmatism illustrates the value of monitoring and evaluating. Learning how others have implemented wellbeing successfully can provide confidence in your own approach and is a great resource. As well as those discussed here there are thousands of online examples you can draw upon. We strongly suggest you do just that, using this book as a place to get started, to create a framework, and for reference as you progress. In this chapter we have called upon our own significant experiences, both academically and in practice, to provide professional advice on what to look out for. We have described the what, and how frequently, you should evaluate what you are doing and the importance of these processes in periodically reviewing your wellbeing, or people, strategy. Although on first glance this chapter may look like a glossary of terms, these concepts all form vital components to the success of any organizational wellbeing strategy.

Being open to challenge can be difficult, but we argue that workplace environments that are open to listening to their workforce and

that permit periodic review, and optimally an independent review, will benefit enormously in terms of staff engagement and wellbeing. We began by looking at the key advantages of strategy setting, and what this can do for your organization. Taking a journey through the key elements we have discussed the strategic importance of goal setting. We claim that this is the same for any business. There are the important aspects of how that links in with your mission, vision and values; how it all aligns and coheres. It ought to be obvious if this is not the case, and we suggest this is carried out at an executive level ultimately, to ensure root and branch take-up. That is to say, that it enables the right hand of your business to effectively communicate and interact with the left – something we have found that in our many years of experience in this field is not always apparent.

This chapter then focuses your attention on the all-important measurement of wellbeing – what that looks like and how it can inform any innovations, interventions or business changes you may consider making. Of course, these may originate from what you have garnered doing these exercises. We have already discussed the pitfalls that measurement can bring, so this is more of a good-practice example, written in a positive frame with some measurement instruments, such as ASSET, that have worked effectively in many organizations as the key measurement approach.

This chapter has explored the subjects of effectiveness and efficiency. After all, that is the aim of all this wellbeing focus collectively. This has also illustrated the key role that wellbeing plays on all your areas of business. We then aligned performance and productivity, linking academic research that will have hopefully convinced you that the outcomes of a well-considered and executed wellbeing strategy will pay dividends.

Ethical considerations are one of the cornerstones, and origins, of meaning and purpose in working life, and in the course of this chapter we have outlined the main components and how they may be viewed, providing examples of exercises that can be carried out with your own workforce. The chapter concludes with a discussion about evaluation. This is all-important – knowing that you are traversing the right lines, creating your own evidence of success, and making meaningful changes for the benefit of your workforce based on what you

have learnt. Having this growth mindset is where you should aspire to be, along with a learning culture, not seeking blame, but business improvement, should be the aim. This chapter should equip you with the key components of a wellbeing strategy; along with an operational delivery plan, it will provide you with a road map of what needs to be done, in what order, by who, and why. This should place your business as one where people want to work, and where you accommodate meaning, purpose, happiness and prosperity. This is brought about by placing your people firmly front and centre of all you do.

Machines and processes, whatever function they perform, will never reach the complexity of the human, with all their strengths, vulnerabilities and frailties. To get that right, or as right as possible, will place you firmly in front. The world of work is growing more complex by the day, with an overwhelming amount of new information being exposed to our workforce. Good wellbeing, considerably thought out and aimed at humanity must surely pay dividends for any organization. We acknowledge it is difficult, but this chapter should give you the information to make some considerable inroads into that complex world.

Key takeaways from this chapter

Strategy setting

Make sure that your wellbeing strategy fits in with what your business does, that it coheres with the main objectives. If this is the case you will have far more chance of implementing an effective strategy in terms of the wellbeing of your workforce. Also, there is far more chance of your workforce adhering to, and valuing, your approach to wellbeing. Look what you can strategically measure and evaluate over time and consider if this coheres with the rest of your organizational goals.

Goals

Set out clear and achievable goals. This is key to goal setting, for if they are too ambitious, or overstretch your workforce, they are

unlikely to be aspired to, achieved or valued. Look at how you will monitor if your goals have been reached, or surpassed, and what that may look like.

Vision

In the dream, this is where your organization sees itself operating. This can be aspirational and usually consists only of a few words, or a strap line. In terms of wellbeing, this should correspond with the vision and have some recognition of the workforce position. You need to consider how you communicate your vision, and how you know that this has become a shared vision within your workforce. How will you monitor and measure the extent to which you have succeeded?

Mission

A mission statement may be slightly more descriptive and highlights the key tenets the organization may wish to pursue to achieve the vision. Once more, wellbeing inclusion is likely to have the overall effect of bringing the workforce on board and in pursuit of the aims of the business. As with the vision, is your workforce united behind the organizational mission? Are all employees putting a man on the moon?

Values

The values must align with the above, as when they are compromised the workforce may disengage. Here you can start to see how this maps the journey, through the lens of strategic direction down to the mechanics of how you get there, with wellbeing rooted firmly in the plans.

Ethics

A branch of moral philosophy and a lens through which to view right and wrong, the workforce can benefit from strong ethics. We discuss ethical dilemmas as a way of discussing issues that may often be seen as grey areas. Corporate social responsibility (CSR) considers many

ethical quandaries when it comes to doing the right thing. Often these are not straightforward, and are subject to change over time, as new knowledge impacts on the workplace.

Measurement

Having briefly touched on the above we now focus on the ‘what’ and here is the first challenge, what to measure? We offer caution on some of the adverse impacts that measurement may have on the workforce and suggest tools that can be used. Surveys such as ASSET can simplify this for you, along with other common workforce metrics such as sickness absence. Measurement needs careful consideration and there are many areas you can focus on. Having clarity about what you want to know is key. Also, creating an environment in which you can stop measurements that are causing more problems than they are resolving is also preferable, relating to many aspects we have discussed already in this book, such as culture and engagement.

Data

With new legislation, and old legislation trying to keep up with new working technologies, we provide an overview of data collection, though this is covered in further detail in our final chapter.

Effectiveness

This explores if your organization is doing what it claims to be doing, or, doing it well. Used in tandem with our next sub-heading this applies to what the business is setting out to do. For example, the main aim of the business may be to produce X; however, there are that many processes and it is that bureaucratic, it ends up doing more of Y. Consider how to measure effectiveness.

Efficiency

Closely linked to effectiveness, efficiency relates to how an organization uses its own resources to be effective. You often hear the phrase

efficiency savings to describe this. The important thing to remember here is that the human resources (ie the people) are most likely the most important part of this in the majority of companies. What you consider to be efficient needs to be established early on and reviewed if necessary. Most organizations change frequently, so adaptation is the key to keeping this relevant; your workforce will surely appreciate this.

Productivity

This area, along with our next, performance, may be where the investment in an effective wellbeing strategy is most felt, when the organization is working like a finely tuned instrument. This is usually because the workforce is fully engaged, drawing meaning and purpose from what they do, and as a direct result they, and the business, are productive. It is rare, we suggest, that you will find high employee wellbeing but poor productivity.

Performance

This can be a further lens to view the fruits of a good wellbeing strategy, with performance being optimal. Remember, you do not want to overstretch the workforce, so leave room in the plans for developmental opportunities, for innovation and for trying new ways of working. This ensures employee buy-in and is far more likely to result in high-performing organizations, teams and individuals.

Happiness

The happiness, or subjective wellbeing, of the workforce is paramount. The brain releases many chemicals that impact on the way a person feels, almost on a moment by moment basis. Although this is not a book on neuropsychology, it is important to recognize that meaning and purpose in working life bring about happiness. If the workforce experiences a deep sense of satisfaction in what they do (their state), you are more likely to have high levels of productivity and performance.

Evaluation

This area is concerned with critically reviewing what you have done, either internally or by a third party independently. As we have said, gold standard would be independent, but if done correctly an internal evaluation can be acceptable. The crux is to see if you have got things right – are you spending the right amount, investing the right amount of time, hiring the right people, promoting the right people? Evaluation needs to be carried out regularly, especially if you are trialling new ways of working, innovations, interventions and so on. Do not be afraid to change tack if the evaluation tells you that you are going off course – that is the whole point of it. We note that many funding opportunities caveat evaluation as a mandatory element, so it is worth thinking about at the start of any programme of work.

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