



Developing Compassionate Workplaces in Europe for the digital and green work environment to protect employees' mental and physical health and wellbeing

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Evaluation Plan

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Acronyms & Abbreviations

Term	Description
CWP	Compassionate Workplace Programme
CMO	Context-Mechanism-Outcome
EoL	End of Life
EU-CoWork IPET	EU-CoWork Implementation and Process Evaluation Toolkit
IPEF	Integrative Process Evaluation Framework
RCT	Randomised-control trial
RE	Realist Evaluation
WP	Work Package

1 Introduction

This deliverable outlines the process evaluation plan that details how implementation of Compassionate Workplace Programmes (CWPs) will be assessed across participating organisations, using measures from the EU-CoWork Implementation and Process Evaluation Toolkit (IPET) developed under Work Package 4 (WP4). While IPET incorporates multiple data collection methods, this evaluation plan focuses strategically on quantitative measures relevant to testing CMO configurations, drawing on Nielsen et al.'s (2023) IPEF framework, which identifies common contextual elements and mechanisms affecting workplace interventions. The specific role of complementary qualitative methods will be detailed in subsequent sections.

The evaluation framework consists of four distinct phases, designed to systematically track implementation progress. Through this comprehensive approach, we identify key variables and constructs at different implementation stages to inform the development and testing of Context-Mechanism-Outcome (CMO) configurations, which will be defined in detail in subsequent sections (see Table 1 for a description of their elements). Given that CWP interventions will be co-created with participating organisations based on Assets and Needs Mapping¹, involving both researchers and organisational stakeholders, the specific interventions are not predetermined.

This co-creative approach means that the exact nature of interventions - and consequently, their evaluation requirements - will emerge through collaborative development. Therefore, this evaluation plan presents potential measurement variables rather than predetermined evaluation protocols. The subsequent sections of this report will elaborate on this adaptive evaluation approach and detail how it accommodates the emergent nature of co-created workplace interventions.

2 Report structure

This report is structured in three main sections. The introduction provides an overview of the EU-CoWork Project and its process evaluation framework, describing the development and theoretical underpinning of Compassionate Workplace Programmes and the rationale for adopting a Realist Evaluation approach. The second section presents the comprehensive process evaluation framework, detailing the four evaluation phases with a strategic focus on core quantitative measurements to systematically track implementation outcomes. This is supplemented by targeted qualitative components that provide contextual depth and capture stakeholder perspectives. The final section begins with illustrative CMO configurations presented as general examples, followed by an overview of participating organisations and their preliminary contextual factors, which includes potential organisation-specific CMO configurations. This adaptive approach ensures the evaluation framework can respond to emerging organisational needs while maintaining rigorous assessment standards across diverse settings.

2.1 Developing Compassionate Workplace Programs (CWPs)

Compassionate Communities are approaches that aim to address the challenges of serious illness, death, and loss by reducing suffering, enhancing wellbeing, and empowering those affected, while acknowledging these experiences as natural parts of life. Compassionate Workplaces apply this philosophy to work environments, encouraging participatory

¹This asset-based and needs-informed approach involves a shift from problem-solving to a salutogenic focus on promoting wellbeing and leveraging existing workplace strengths, resources, and capacities (Antonovsky, 1987). Initial workplace engagement involves co-creation discussions and role/responsibility agreements facilitated by a researcher and facilitator. Tools like asset mapping and needs assessment interviews, outlined in the facilitator manual, support this process.

approaches to develop policies and initiatives that support employees facing end-of-life challenges. Although resources and theoretical frameworks are available, there is limited practical evidence on how to design and implement effective programs, leaving gaps in understanding their processes, outcomes, and impact (Vanderstichelen et al., 2024).

The development of Compassionate Workplace Programs (CWPs) across participating organisations follows a co-creative approach. This methodology diverges significantly from traditional development, implementation, and evaluation models, which typically emphasise standardisation and implementation fidelity of pre-defined initiatives. Instead, CWPs represent evolving initiatives characterised by an asset-based foundation. They emphasise experiential knowledge exchange without preconceptions about knowledge relevance and maintain a strong focus on facilitation and customisation to meet diverse organisational needs.

As mentioned, the development of CWPs is inherently co-creative, centring on the reorientation of workplace settings through continuous change and adaptation (Vanderstichelen et al., 2024). Essential to this co-creative process is the establishment of dedicated spaces for feedback and reflection, which are anticipated to play a crucial role in ensuring the sustainable organisational development of CWPs beyond the project timeframe.

The specific activities and interventions comprising each CWP will be uniquely tailored to individual workplaces through five key components:

1. Asset and needs mapping
2. Facilitated co-creation of outputs (through co-development groups)
3. Facilitated knowledge exchange workshops
4. Communities of practice
5. The inspiration materials

While the precise nature of these activities cannot be predetermined, they can be categorised across six domains.

1. *Policy Development*. Development and revision of organisational policies to support workplace flexibility, openness, and destigmatisation around end-of-life experiences through formal company agreements.
2. *Social and Physical Environment Adaptation*. Creation of dedicated spaces and implementation of awareness-raising initiatives to strengthen workplace relationships and community engagement.
3. *Workplace Well-being Services Reorientation*. Integration of compassionate workplace principles into existing well-being services to enhance end-of-life support capabilities.
4. *Skills and Self-efficacy Enhancement*. Development of essential competencies for grief support and leadership training to foster a compassionate workplace culture.
5. *Knowledge Exchange and Support Networks*. Establishment of peer support groups and buddy systems to facilitate shared learning and mutual support.
6. *Community Initiative Promotion*. Facilitation of spontaneous community activities that strengthen workplace compassion and support networks.

For detailed methodologies regarding the Developmental Evaluation Protocol and Inspiration Resource, please refer to deliverables D2.1 and D2.2, respectively.

Given the complex and emergent nature of these workplace-specific interventions, a robust process evaluation framework has been developed to assess their development, implementation and impact, as described in the following section.

2.2 Process Evaluation

The EU-CoWork project employs Realist Evaluation (RE) as its theoretical framework for assessing intervention processes and outcomes (Pawson & Tilley, 1997). Given the complex and emergent nature of the CWPs described earlier, RE provides an ideal evaluation

framework as it extends beyond simple assessments of intervention effectiveness to address the more nuanced question: "what works for whom under which circumstances?" Unlike randomised-control trials (RCT) that attempt to control intervention conditions, RE embraces and learns from real-world complexity, aligning with our co-creative development approach.

The operational core of RE lies in testing **Context-Mechanism-Outcome (CMO) configurations**. **Context** generally refers to the factors around the intervention that may hinder or facilitate its implementation as envisioned. For example, participatory interventions require a context of mutual trust between workers and managers to enable effective collective decision-making. This approach also identifies two distinct types of working **mechanisms** that are particularly relevant to the six domains outlined previously:

1. *Content mechanisms* relate to the CWP interventions' topic or core content. For instance, in participatory interventions, the mechanism might involve workers developing collective decision-making skills to improve work practices and policies within the CWP framework.
2. *Process mechanisms* concern implementation methods and processes. Success depends on participant engagement - without active participation in decision-making and change implementation, the CWP interventions are likely to fail. This is particularly crucial given the co-creative nature of CWP development.

These mechanisms can only achieve their intended **outcomes** (such as developing compassionate workplaces and improving health and well-being) within a receptive context.

CMO configurations are typically expressed as "if...then..." statements (see Table 1).

Table 1. Description of CMO configurations

Concept	Description
CMO-configuration	The "if... then..." propositions to be tested for each intervention.
Context	Context refers to the contextual factors that may hinder or facilitate the implementation of the CWP interventions as envisioned. We distinguish between 'omnibus context' which is the culture and stable factors in the context and the 'discrete context', which refers to the events that happen throughout the intervention that influence intervention outcomes.
Mechanism	For the EU-CoWork project we consider two types of mechanisms, i.e., what is considered to be the working ingredients of the intervention. The first, outlined here, are the process mechanisms, which refer to the processes that are needed to be triggered for the intervention to work, for example a compassionate climate. The second, is the content mechanisms, these are the mechanisms concerning the content of the intervention, e.g., the mechanisms that explain why compassionate policies may have an effect.
Outcomes	These are the effects of the CWP interventions. In the Co-Work project, they are measures of culture of compassion and health and well-being.

In alignment with the co-creative approach described in the previous section, implementation plans have not been established a priori. Rather, the formulation of tailored CMO configurations specific to each site's CWP elements will emerge through collaborative development during the Preparation Phase (Phase 0), led by each workplace's designated Co-Development Group. Consequently, this Process Evaluation plan offers specific variables that will be measured in the different phases of the implementation process and exemplar

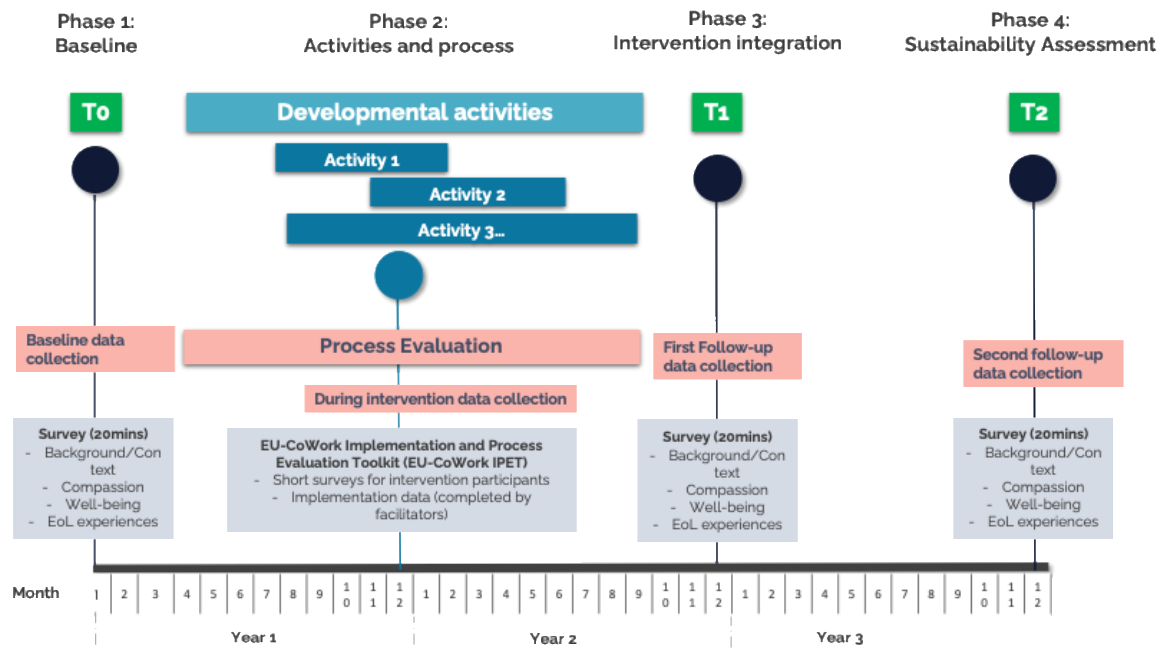
CMO configurations intended to illustrate possibilities rather than providing predetermined, site-specific configurations for each intervention location.

In the EU-CoWork project, CMO configurations will be developed for each individual CWP intervention based on the previously conducted Assets and Needs Mapping. While the project encompasses multiple data collection streams, this report focuses specifically on the process evaluation variables that will inform these configurations. The evaluation process comprises four distinct phases:

- **Phase 1: Baseline (Pre-CWP Interventions).** This initial phase establishes baseline measurements of organisational context and outcomes. These measurements provide foundational data for understanding each workplace's starting point and general context.
- **Phase 2: Activities and Process (During CWP Interventions).** During the intervention period, data collection occurs at the conclusion of each CWP individual intervention. This phase captures participants' immediate perceptions and experiences of intervention activities, including workshops, training sessions, and other programmatic elements.
- **Phase 3: Intervention integration (Post-CWP Interventions)** (24 months post-baseline). Following the Activities and Process phase, this evaluation assesses the integration of interventions into daily work practices and procedures. It examines how interventions influence participants' cognitive and emotional responses to organisational reality. Site-specific proximal measures may be incorporated at this stage to capture unique workplace outcomes.
- **Phase 4: Sustainability Assessment** (36 months post-baseline). The final phase, conducted twelve months after Phase 3: Intervention integration (Post-CWP Interventions), evaluates the long-term sustainability of changes. This assessment focuses on measuring sustained improvements in workplace compassion and overall health and well-being outcomes.

Figure 1 represents the four phases of the quantitative process evaluation (Phase 1 to 4). A comprehensive overview of the measures integrated within each phase, including specific variables measuring context, mechanisms, and outcomes at each time point, is provided in Appendix 1 (Figure 2). A more detailed outline of the main EU-CoWork activities for each phase are illustrated in Figure 3 (Appendix 2).

Figure 1. Graphical representation of the four phases of data collection.



3 Phase 1: Baseline (Pre-CWP Interventions)

The pre-CWP interventions phase establishes baseline measurements to assess the initial workplace context regarding compassion, well-being, and end-of-life (EoL) experiences. This phase serves two critical purposes: developing a detailed understanding of the current state within participating workplaces across all project countries and establishing baseline measurements for evaluating subsequent changes throughout the intervention period. This baseline phase incorporates multiple data collection methods, including surveys, interviews, and focus groups. However, as mentioned, this evaluation plan focuses strategically on quantitative measures relevant to testing CMO configurations, particularly contextual factors. This strategic focus draws on Nielsen et al.'s (2023) IPEF framework, which identifies common contextual elements affecting workplace interventions that can be systematically assessed across all employees. Qualitative data will serve as a complementary source for deeper understanding of these contextual factors where needed, particularly for identifying site-specific factors that may emerge in different organisational contexts.

Following this framework, our Process Evaluation will focus on specific contextual variables from the baseline survey that are crucial for understanding CWP implementation and effectiveness. From the comprehensive baseline data collection, the process evaluation will specifically examine job demands (such as workload) and available resources (such as autonomy), the current state of compassionate climate within the organisation, and the context for communication around EoL experiences. The evaluation will also focus on organisational readiness for change, employees' knowledge of the programme, and their awareness of and access to existing organisational policies. While the baseline phase encompasses additional measures and methods, these specific contextual measurements are essential for evaluating implementation processes and intervention outcomes.

Examples of these measures are presented in Table 2. The assessed contextual factors are expected to influence intervention mechanisms, either facilitating or hindering their effectiveness within workplace settings. These baseline assessments of contextual factors and initial outcome levels will form the foundation for developing site-specific CMO configurations, with detailed examples provided in the section 'Examples of potential CMO-configurations'.

Table 2. Phase 1 measures

Measure	Description	Respondent
Compassionate leadership or supervisor support	This measure captures the degree to which leaders demonstrate compassion and understanding towards staff needs and challenges.	All staff and managers in the intervention site
Workload	This measure captures the workload of staff, i.e., the subjective time pressure.	All staff and managers in the intervention site
Job autonomy	This measure captures the autonomy and/or control of staff.	All staff and managers in the intervention site
Compassionate climate	This measure captures the organizational environment and shared perceptions of how compassion is expressed and valued within the workplace, including institutional norms, practices, and attitudes that support or hinder compassionate behaviors.	All staff and managers in the intervention site
Context for communication	This measure captures the extent to which the EU-CoWork project has been communicated to staff.	All staff and managers in the intervention site
Readiness for change and belief in program	This measure captures the extent to which staff are prepared for change and their commitment to/acceptance of the EU-CoWork project.	All staff and managers in the intervention site
Awareness of and access to organisational and national policies	This measure captures the extent to which staff are aware of the organisational and national well-being policies and they access those.	All staff and managers in the intervention site
Well-being	The overall mental, physical, and emotional health of staff (baseline pre-intervention).	All staff and managers in the intervention site
Compassion	This measure assesses both the individual experience of receiving compassion from others and one's own compassionate behaviors towards colleagues, capturing the bidirectional nature of compassionate interactions in the workplace. (baseline pre-intervention).	All staff and managers in the intervention site
Stigma	The level of negative attitudes or discrimination towards staff who express negative emotions, deal with grief, or face caregiving challenges.	All staff and managers in the intervention site

Note: As mentioned, while this evaluation plan strategically focuses on core quantitative measures aligned with Nielsen et al.'s (2023) IPEF framework, the EU-CoWork project includes qualitative data collection through focus groups, interviews, and document extraction. This mixed-methods approach could be particularly valuable when testing CMO configurations, potentially serving two key purposes: expansion and complementarity (Bryman, 2006). Through expansion, qualitative data may provide rich insights into site-specific assets, needs, and mechanisms that might not be captured through standardised measures. Similarly, through complementarity, qualitative methods could enhance our

understanding of the phenomena being measured quantitatively by helping to explain how and why certain contextual factors influence implementation processes. Together, this approach combines the systematic assessment of quantitative measures across all participating organisations with the potential for nuanced exploration of implementation dynamics, particularly when testing and refining CMO configurations for each specific context.

4 Phase 2: Activities and Process (During the CWP Intervention)

This phase encompasses the co-creation and implementation of tailored Compassionate Workplace Programmes (CWPs) across participating workplaces. The process evaluation during this phase focuses on assessing key implementation mechanisms that may influence intervention outcomes. Each CWP may comprise multiple intervention activities, which could occur at individual, group, leader or organisational levels. These activities may include face-to-face or online training sessions, workshops for developing new procedures or policies, and adaptations to social and physical environments, though specific activities will depend on identified assets and needs through the co-creative process².

For activities at individual, group or leader levels, key mechanisms include design quality, participant acceptance, voluntary participation, and intention to apply learnt content. For consultants/trainers who provide specific training, the overall group atmosphere significantly influences participant support and outcomes. At the organisational level, activities may focus on policy development, procedural changes, or creating places of solace, with facilitators³ guiding these processes. The effectiveness of these interventions depends on participants' perception of their appropriateness in addressing workplace challenges.

As this is an Evaluation Plan, we focus on aspects crucial for testing CMO configurations. Measurement of implementation mechanisms should occur at the conclusion of each activity set, such as after the final action planning workshop or training session. Data collection can be conducted either through paper-based assessments during the final session or via electronic surveys distributed afterwards. Specific mechanisms to be assessed are outlined in Table 3a for individual, group or leader level activities and Table 3b for organisational level interventions. For detailed data collection instruments and procedures, see deliverable D3.1.

Table 3a. Phase 2 measures (workshop or training activities)

Measure	Description	Respondent
Intention to transfer	This measure captures the extent to which participants intend to transfer what they have learned into their daily work.	All staff and managers who have participated in the intervention activity.
Voluntary participation	Single item measure capturing whether participants in the intervention participate voluntarily.	All staff and managers who have participated in the intervention activity.

² While process evaluation data collected during this phase could inform ongoing implementation, the responsive adaptation of interventions based on continuous feedback falls under developmental evaluation, which runs in parallel to this process evaluation. The developmental evaluation approach supports collective organisational learning and continuous adaptation of CWP interventions. This process evaluation framework focuses specifically on measuring implementation mechanisms to test CMO configurations

³ The distinction between roles reflects different intervention levels. Facilitators typically lead organisational-level interventions, guiding processes such as policy development or workplace adaptations. In contrast, consultants/trainers generally lead individual, group, or leader-level activities, providing specific training or skill development. These roles may be filled by internal staff or external experts engaged by the organisation.

Activity Design and Acceptability of Content	This measure captures participants' perceptions of the quality of training materials and delivery methods, and the extent to which they feel the training content is relevant and valuable for their role.	All staff and managers who have participated in the intervention activity.
Participant's perceptions of trainers	This measure captures the participants' perceptions of the role of the consultants/trainers in delivering the training.	All staff and managers who have participated in the intervention activity.

Table 3b. Phase 2 measures (organisational level actions)

Measure	Description	Respondent
Appropriateness of action plans	This measure captures the extent to which the plans and actions were appropriate for the organisations' needs.	All staff and managers who have participated in the intervention activity.
Activity Design and Acceptability of Content	This measure captures participants' perceptions of the workshop/meeting structure and facilitation process, and the extent to which they feel engaged with the collaborative development process.	All staff and managers who have participated in the intervention activity.
Participant's perceptions of facilitators	This measure captures the participants' perceptions of the role of facilitators in guiding the co-creation activities.	All staff and managers who have participated in the intervention activity.
Activity-induced mindset change	The extent to which the activities changed people's way of thinking will influence whether they make any changes.	All staff and managers who have participated in the intervention activity.

Note: Similar to the baseline phase, qualitative data collection during Phase 2 could complement the quantitative measures to provide deeper insights into implementation processes. This might include facilitators' documentation, capturing implementation dynamics and contextual changes. Where needed, qualitative methods such as interviews and focus groups may help explain how intervention activities interact with workplace contexts. For example, while activity-induced mindset changes are measured quantitatively, focus groups could provide richer understanding of how and why activities influence participants' thinking patterns. This potential mixed-methods approach maintains the dual purposes of expansion and complementarity (Bryman, 2006; Nielsen et al., 2023), potentially enriching our understanding of the implementation process.

5 Phase 3: Intervention Integration (Post-CWP Intervention)

The first follow-up evaluation will be conducted 24 months after baseline data collection. While this phase marks the formal conclusion of the project's facilitated development stage, workplaces may independently continue developing and implementing their CWP initiatives beyond this timeframe. From a process evaluation perspective, this phase specifically assesses two key aspects: the integration of intervention activities into daily work practices and procedures, and changes in participants' cognitive and emotional responses to organisational reality.

In Phase 3, process evaluation measures will be included in the longitudinal survey (T1), which will also collect data on proximal outcomes. This evaluation plan maintains its strategic focus on process evaluation variables, particularly those capturing participants' engagement with

interventions and their perceptions of how activities are being implemented, supported, and integrated into daily work and organisational policies. Additional site-specific process measures may be included to capture unique implementation outcomes at each location.

For individual, group or leader level activities (such as workshops, training sessions, or online materials), the key mechanism is training transfer to the workplace, with critical contextual factors including opportunities to apply learning and line manager support. These specific mechanisms are outlined in Table 4a.

Table 4a. Phase 3 measures (workshop or training activities)

Measure	Description	Respondent
Opportunities to use	This measure captures participants' perceptions of whether they have or would have the opportunity to integrate new behaviours into their work context when needed.	All staff and managers who have participated in the intervention activity.
Manager support	This measure captures the extent to which the immediate manager supports workshops or training participants to try out new behaviours.	All staff and managers who have participated in the intervention activity.
Training transfer	This measure captures the extent to which workshops or training participants use what they learned during training in their daily work.	All staff and managers who have participated in the intervention activity.

For organisational-level changes (such as policy development or creation of places of solace), several key mechanisms influence outcomes, particularly as these changes are planned by the co-development group and require broader employee engagement. Critical factors include implementation fidelity to schedule, appropriateness for the organisational setting, line manager support, and staff awareness, understanding, and utilisation of new policies and procedures (Practise adoption). Table 4b provides detailed measures for evaluating these mechanisms.

Table 4b. Phase 3 measures (organisational level actions)

Measure	Description	Respondent
Action plan implementation	Staff perception of the extent to which actions are being implemented by the organisation.	All staff and managers in the intervention site
Intervention fit	Staff perception of the extent to which the intervention is integrated into existing practices and procedures.	All staff and managers in the intervention site
Practice Adoption	This measure captures the extent to which staff engage with and utilize new CWP-related policies, procedures, and initiatives implemented through the action plan.	All staff and managers in the intervention site
Line manager involvement	The extent to which line managers support the intervention.	All staff and managers in the intervention site

Note: Similar to previous phases, qualitative data collection during Phase 3 could complement the described quantitative measures to provide deeper insights into how intervention activities are being integrated into daily practises. Through methods such as interviews and focus groups, participants might reflect on their engagement with new practises and procedures, and how these are being incorporated into routine operations. Where needed, these qualitative approaches may help identify discrete contextual factors that have developed during or after intervention implementation, and explain how participants are transferring training into practise and how organisational-level changes are being utilised. For example, while practice adoption is measured quantitatively, qualitative methods could provide richer understanding of the factors facilitating or hindering the integration of new practises into daily work. This potential mixed-methods approach maintains the dual purposes of expansion and complementarity (Bryman, 2006; Nielsen et al., 2023), potentially enriching our understanding of implementation processes.

6 Phase 4: Sustainability Assessment

Phase 4 marks the final evaluation point of the project, occurring approximately one year after the end of the facilitated workplace interventions (approximately three years post-baseline measurements). This phase focuses on assessing the long-term sustainability of Compassionate Workplace Programmes and their broader organisational impact. Similar to previous phases, while multiple outcomes will be measured at this time point, our process evaluation specifically examines how changes have been sustained and how compassionate workplace practices have evolved. Measures detailed in Table 5 will assess the durability of implementation processes and capture any emergent or unexpected outcomes that have developed through the co-creative process and CWP implementation.

Table 5. Phase 4 measures

Measure	Description	Respondent
Perceived Sustainability of Changes	This measure assesses the extent to which staff members perceive that CWP initiatives have been effectively integrated into daily work practices and continue to create lasting positive changes in the workplace.	All staff and managers in the intervention site
Well-being	The overall mental, physical, and emotional health of staff (baseline pre-intervention).	All staff and managers in the intervention site
Compassionate climate	This measure captures the organizational environment and shared perceptions of how compassion is expressed and valued within the workplace, including institutional norms, practices, and attitudes that support or hinder compassionate behaviors.	All staff and managers in the intervention site
Compassion	This measure assesses both the individual experience of receiving compassion from others and one's own compassionate behaviors towards colleagues, capturing the bidirectional nature of compassionate interactions in the workplace. (baseline pre-intervention).	All staff and managers in the intervention site
Stigma	The level of negative attitudes or discrimination towards staff who express negative emotions, deal with grief, or face caregiving challenges.	All staff and managers in the intervention site

Note: Similar to previous phases, qualitative data collection during Phase 4 could complement the quantitative measures to provide deeper insights into the long-term sustainability of CWP initiatives. Through methods such as interviews and focus groups, participants might reflect on how compassionate workplace practices have become embedded within organisational culture and routine operations. Where needed, these qualitative approaches may help explain how implemented changes have been maintained, adapted, or evolved over time. For example, while the sustainability of procedures and policies is measured quantitatively, qualitative methods could provide richer understanding of how these have influenced organisational culture, particularly regarding compassionate climate, employee well-being, and attitudes toward end-of-life experiences. This potential mixed-methods approach maintains the dual purposes of expansion and complementarity (Bryman, 2006; Nielsen et al., 2023), potentially enriching our understanding of long-term implementation outcomes.

7 Implementing the Evaluation Framework: CMO Configurations

In the previous sections, this evaluation plan has outlined a comprehensive framework for assessing Compassionate Workplace Programmes' implementation across four distinct phases. As discussed earlier, while our strategic focus is on quantitative measures aligned with Nielsen et al.'s (2023) IPEF framework, qualitative methods could complement this approach where needed. The evaluation framework has detailed systematic data collection approaches for each phase, from baseline measurements through implementation and post-intervention evaluation, to final sustainability assessment.

Building on this framework, we now examine potential Context-Mechanism-Outcome (CMO) configurations. These configurations guide our research by identifying key mechanisms that need to be activated within each organisation's specific context to achieve intended outcomes, following the formula 'If [context]... then [mechanism]... as a result [outcome]...' While the quantitative measures detailed in previous sections form the primary basis for testing these configurations, qualitative or mixed-methods approaches might provide complementary insights where needed. The relationships between constructs within each CMO may be tested using different analytical models. The following section provides examples of such configurations.

While these CMO configurations serve as illustrative examples, it is important to note that the final configurations will be developed collaboratively with the Implementation Partners following Baseline data collection. This approach aligns with the co-creative nature of the project, where the exact nature of interventions - and consequently, their evaluation requirements - will emerge through collaborative development. This collaborative process ensures that the evaluation framework remains responsive to local contexts while maintaining methodological rigour across the project. Specifically, once the Assets and Needs mapping is completed and baseline data are collected, WP4 will work with intervention partners to develop tailored CMO configurations for each specific intervention activity within their CWP, accommodating the emergent nature of co-created workplace interventions.

These CMO configurations will also serve as a valuable analytical framework for cross-organisational comparison. By identifying similar contexts, mechanisms, or outcomes across different organisations, we can analyse comparable interventions, even when implemented in different countries or sectors. This approach enables us to understand both how similar mechanisms operate under different contextual conditions and how varying organisational contexts might influence the effectiveness of similar interventions. Given our diverse sample

of organisations across different welfare regimes, sectors, and sizes, this cross-case analysis will help identify patterns in what works, for whom, and under what circumstances.

7.1 Examples of potential CMO-configurations

The following examples illustrate potential CMO configurations using the 'If [context]... then [mechanism]... as a result [outcome]' structure. CMO configurations can vary in complexity depending on the nature of the intervention and organisational context. While some may take a simple form with one context, mechanism and outcome variable, others might include multiple contextual factors, mechanisms and outcomes operating in concert. These configurations function as middle-range theories, providing testable propositions about what works, for whom, and under what circumstances (Roodbari et al., 2022). The relationships between variables in these configurations can be tested through quantitative models, qualitative analysis, or mixed-methods approaches, depending on the evaluation needs. The examples below progress from simpler to more complex configurations to illustrate this range of possibilities. These configurations are provided as guidance and will be refined based on each workplace's specific context.

1. **IF** job demands are manageable and there is high readiness for change [context], **THEN** participants will actively engage with facilitators during implementation and integrate new practices into their work routines [mechanisms] **AS A RESULT**, the organisation will demonstrate reduced stigma around grief experiences and enhanced compassionate climate [outcomes]
2. **IF** there is strong manager support, adequate job resources, and clear opportunities to use new skills [context] **THEN** employees will voluntarily participate in compassion skill training, perceive the content as relevant, and actively transfer learning to their daily work interactions [mechanisms] **AS A RESULT** the workplace will show reduced stigma around EoL discussions and an enhanced compassionate climate [outcomes]
3. **IF** there is an established context for communication and adequate awareness of existing policies [context] **THEN** line managers will actively engage in policy development workshops, participate in implementation planning, and demonstrate commitment to new supportive practices [mechanisms] **AS A RESULT** employees will report improved well-being and increased expressions of compassion in the workplace [outcomes]
4. **IF** there are sufficient job resources and strong line manager involvement [context] **THEN** employees will positively perceive the design of peer support activities, voluntarily participate in support networks, and implement agreed support practices [mechanisms] **AS A RESULT** employees will show improved well-being through enhanced social support and strengthened compassionate interactions [outcomes]
5. **IF** spaces for solace are well-designed, accessible, and supported by organisational policies [context] **THEN** employees will regularly use these spaces for grief rituals and emotional support [mechanisms] **AS A RESULT**, employees will be able to express their grief and report stronger workplace social connections, improved grief coping, and increased perception of organisational support [outcomes]
6. **IF** policies are clearly communicated, easily accessible, and aligned with employee needs [context], **THEN** employees will understand and consistently utilise support policies, while managers will actively promote their use [mechanisms] **AS A RESULT**, there will be increased policy uptake, reduced stigma around policy use, and improved work-life integration [outcomes]

The following examples illustrate more complex configurations involving multiple contextual factors, mechanisms, and outcomes:

1. **IF** there is a workplace with active participatory culture, supportive climate, open communication channels, manageable job demands, and employee readiness for change [contexts] **THEN** participants will actively engage with training content, apply learned skills in daily work, share learning with colleagues, and develop new compassionate work practices [mechanisms] **AS A RESULT** employees will demonstrate increased self-compassion, enhanced compassion towards colleagues, and improved quality of care delivery, which will lead to strengthened compassionate workplace culture, reduced work-related stress, and enhanced employee well-being [outcomes]
2. **IF** there is strong leadership commitment, organisational readiness for change, and established change management processes [contexts] **THEN** management will actively support the intervention, employees will perceive action plans as appropriate, show collective commitment to implementation, demonstrate positive intervention acceptance, and develop enhanced capacity for well-being management [mechanisms] **AS A RESULT** the organisation will show improved communication practices, enhanced employee engagement, and increased participatory decision-making, which will lead to better employee health outcomes and enhanced workplace well-being [outcomes]
3. **IF** the organisation demonstrates leadership commitment, strong participatory structures, open communication channels, readiness for change, job security, and manageable workloads [contexts] **THEN** management will visibly support and champion implementation, employees will recognise action plan appropriateness, commit to implementation, show positive intervention acceptance, and develop enhanced well-being management capabilities and improved understanding of compassionate practices [mechanisms] **AS A RESULT** the organisation will achieve enhanced communication effectiveness, improved cross-level coordination, and strengthened organisational citizenship, leading to increased compassionate climate and improved employee health and well-being [outcomes]

8 Participating organisations

The EU-CoWork Compassionate Workplace Programmes will be co-created and evaluated across organisations in four intervention countries: Belgium, Austria, Greece, and Sweden. These countries represent diverse welfare regimes, including Nordic, Southern, and state corporatist systems, providing valuable comparative contexts. The selection strategy aimed to capture heterogeneous work environments affected by the twin transitions, spanning primary (extraction of raw materials/natural resources), secondary (manufacturing), and tertiary (service) sectors.

Recognising that workplace compassion and CWP co-creation dynamics may vary significantly with organisational scale, we included organisations of varying sizes, from small (fewer than 50 employees) through middle-sized (50 – 500 employees) to large organisations (more than 500 employees).

The currently recruited organisations represent this diverse sampling framework. Initial contextual factors for each organisation have been identified through preliminary meetings between organisations and intervention implementation partners, supplemented by available company documentation.

The Process Evaluation plan will be updated once three key elements are in place: first, when results from the Assets and Needs mapping are available; second, following the analysis of baseline data collected in Phase 1; and third, after the formation of co-development groups and their identification of potential interventions for specific CMOs. **This update will incorporate tailored CMO configurations that capture the specific CWP elements**

relevant to each intervention site, ensuring the evaluation framework remains responsive to local organisational contexts while maintaining methodological rigour.

Organisation PS1

Organisation PS1 is a small enterprise in the food production sector, employing approximately 25 people across multiple operational sites. The company operates with an integrated business model, managing various stages from production to retail. Staff are distributed across production facilities, retail locations, and administrative functions.

Initial context factors identified through preliminary meetings indicate several important elements. The operations are part of a larger corporate group, with work units functioning relatively independently. This structure has led to distinct unit identities and some coordination challenges between different parts of the organisation. The diverse work schedules across different operational areas and multiple site locations present particular considerations for intervention implementation.

From a leadership perspective, management has demonstrated strong support for well-being initiatives and commitment to resource allocation for employee support. The workforce and management team are relatively young, and there is clear HR leadership with strong executive support. These factors will be important considerations in the development and implementation of the CWP.

Given the current understanding of this organisation's context, particularly its strong management support but challenges with unit coordination, a potential CMO configuration could look like this:

“IF there is strong management and HR support, but work units operate independently with different schedules [context] **THEN** managers will actively participate in developing and implementing new communication procedures across units, and employees will engage in structured cross-unit activities [mechanisms] **AS A RESULT** the organisation will show improved cross-unit communication and enhanced workplace support, leading to better employee well-being [outcomes].”

Organisation PM2

Organisation PM2 is a medium-sized enterprise in the industrial materials sector, operating across multiple sites, including production facilities, research centres, and office locations. With approximately 400 employees, the organisation manages diverse operations ranging from raw material extraction to advanced processing. The workforce is distributed across varied environments, with notably different workplace cultures between office-based and production sites. The company emphasises employee development, innovation, and inclusive workplace practices.

Initial context factors identified through preliminary meetings highlight two key elements. First, there are distinct workplace cultures across different operational sites, with marked demographic variations between office and production environments. Second, management has demonstrated strong support for well-being initiatives and commitment to resource allocation for employee support.

Given the current understanding of this organisation's context, particularly its diverse workplace cultures and strong management support, potential CMO configurations could look like this:

“IF there is strong management support and resource commitment (job resources), but distinct workplace cultures across sites with demographic differences [context] **THEN** inclusive communication practices implemented will promote active participation from both office and production staff, and regular communication meetings (training transfer)

[mechanisms] **AS A RESULT** the organisation will develop a more unified compassionate climate while respecting site-specific needs, leading to improved employee well-being across all locations [outcomes].”

Organisation PL3

Organisation PL3 is a large enterprise in the resource extraction sector, employing approximately 550 people across multiple operational sites. The organisation plays a significant role in its local communities' employment and economic landscape. While historically focused on promoting workplace diversity and employee development, the organisation has recently undergone significant changes, including workforce reduction and departmental restructuring.

Initial context factors identified through preliminary meetings highlight particular challenges. The organisation is experiencing a period of job insecurity following recent workforce reductions. Additionally, ongoing departmental restructuring and management changes have impacted organisational priorities and change readiness.

Given the current understanding of this organisation's context, particularly the challenges with job insecurity and organisational change, potential CMO configurations could look like this:

“**IF** there is ongoing organisational restructuring and employee concerns about job security, alongside willingness to participate in new initiatives (readiness for change) [context] **THEN** targeted new support mechanisms implemented will ensure clear communication about available resources and employee use, and engage line managers in supporting employee well-being during change [mechanisms] **AS A RESULT** employees will report better coping with organisational change, reduced stress from uncertainty, and improved access to support resources related to well-being [outcomes].”

Organisation SM1

Organisation SM1 is a medium-sized manufacturing and distribution company with approximately 100 employees, operating primarily in their domestic market with international distribution networks. The organisation has a long-standing history of over six decades and maintains its original family ownership structure. While committed to innovation and growth, the company maintains strong traditional values and informal organisational culture.

Initial context factors identified through preliminary meetings reveal that the organisation demonstrates a commitment to structured policy development while valuing its informal, family-oriented culture. Executive leadership, including a CEO with a behavioural science background, shows strong support for employee well-being initiatives. However, the organisation operates without a formal HR structure, and there are some complexities in executive team dynamics. The company has existing experience with external collaborations for workplace improvements.

Given the current understanding of this organisation's context, particularly its informal culture and leadership commitment to well-being, potential CMO configurations could look like this:

“**IF** there is strong leadership commitment to well-being and readiness for change but informal organisational structures [context] **THEN** managers (at several levels) will engage in modelling new practices and ensure broad employee participation in policy development (participation) [mechanisms] **AS A RESULT** the organisation will achieve enhanced workplace support structures, leading to improved employee well-being [outcomes].”

Organisation SL2

Organisation SL2 is a large public organisation in the transportation infrastructure sector, employing over 9,000 people across multiple locations. Operating under a larger governmental structure, the organisation manages critical national infrastructure with clearly defined responsibilities and operational procedures. The organisation maintains a complex structure with multiple directorates and service divisions, emphasising diversity, inclusion, and formal management processes.

Initial context factors identified through preliminary meetings highlight the organisation's highly structured nature, with formal policies and procedures already in place for employee support and development. As a public organisation, it operates within established governmental frameworks while maintaining significant operational autonomy in workplace development. The ongoing organisational restructuring is causing uncertainty and insecurity mainly about job design and re-design, predominantly affecting middle management. However, the organisation is committed to staff well-being, with a range of initiatives already being in place. They are also motivated by the project's scientific nature and expert involvement, and the prospect of knowledge exchange with their European counterparts.

Given the current understanding of this organisation's context, particularly its large-scale and formal organisational structure, potential CMO configurations could look like this:

“IF there are established formal support structures within a large, multi-site and clear management process and employees are willing to create a more compassionate environment [context] **THEN** employees will perceive new compassionate workplace practices are integrated into existing formal systems, ensure consistent implementation across locations, and engage in compassionate behaviours [mechanisms] **AS A RESULT** the organisation will develop consistent, compassionate support practices across all locations while maintaining operational efficiency and improving employee well-being [outcomes].”

Organisation TS1

Organisation TS1 consists of two closely related educational facilities under single management, employing approximately 35 staff members in total. Operating within public sector frameworks, both sites follow standardised national and local directives while maintaining distinct operational approaches. While sharing overall management and similar socio-demographic contexts, each site maintains independent working practices and distinct identities.

Initial context factors identified through preliminary meetings highlight several key elements. The facilities operate within a challenging regional context experiencing economic decline. Despite shared management, there are coordination challenges between the two sites, with each location maintaining relatively independent operations and distinct work unit identities.

Given the current understanding of this organisation's context, particularly its dual-site structure and coordination challenges, potential CMO configurations could look like this:

“IF there are two distinct work units with limited integration but shared management structure, operating in a challenging regional context and employees are aware of the project and are willing to change their behaviour regarding EoL and well-being [context] **THEN** new support mechanisms that respect site individuality while fostering cross-site learning will promote management engagement and employee use [mechanisms] **AS A RESULT** employees will report enhanced well-being through improved social support, while both sites develop a stronger shared compassionate climate that respects local practices [outcomes].”

Organisation TM2

Organisation TM2 is a medium-sized business services company employing approximately 45 people distributed across seven distinct operational departments. Operating as part of a larger corporate group, the organisation maintains specialised service delivery functions including customer support, sales, logistics, and administrative operations.

Initial context factors identified through preliminary meetings show some complex dynamics. While part of a larger corporate structure, departments operate with considerable independence, creating distinct unit identities and coordination challenges. Work schedules vary significantly across departments, potentially affecting intervention implementation. However, the organisation benefits from supportive management, a relatively young workforce receptive to new ideas, and strong HR leadership with executive support.

Given the current understanding of this organisation's context, particularly its departmental diversity and management support, potential CMO configurations could look like this:

“IF there is strong management and HR support but independent departmental operations and varying work schedules [context] **THEN** the flexible support mechanisms implemented that accommodate employee different schedules will foster employee participation and developing shared compassionate practices [mechanisms] **AS A RESULT** employees will experience enhanced compassion and well-being, leading to a more unified and compassionate organisational climate despite operational differences [outcomes].”

Organisation TM3

Organisation TM3 is a medium-sized cultural institution operating as an autonomous municipal entity, employing approximately 75 staff members and volunteers. The organisation manages substantial cultural collections while serving multiple community functions, including public engagement, education, and artistic development. Operating across multiple sites, it maintains complex stakeholder relationships, including municipal oversight, community partnerships, and international collaborations.

Initial context factors identified through preliminary meetings highlight two key elements. While the organisation is undergoing restructuring, it also demonstrates a strong commitment to employee well-being through established strategies and previous initiatives. As a public-facing cultural institution, it operates within specific municipal frameworks while maintaining operational autonomy in its workplace practices.

Given the current understanding of this organisation's context, particularly its combination of organisational change and established well-being focus, potential CMO configurations could look like this:

“IF there is organisational restructuring but also established well-being practices and employee willingness to create a more compassionate environment [context] **THEN** employees will perceive the new procedures being integrated into existing well-being initiatives, promoting participation, fit with previous initiatives, and encourage employee utilisation [mechanisms] **AS A RESULT** employees will experience improved well-being through enhanced support structures, reinforcing the compassionate workplace climate during the transition [outcomes].”

Organisation TM4

Organisation TM4 is a medium-sized public organisation providing municipal services across multiple locations, employing approximately 200 people. The organisation delivers diverse public services while maintaining a focus on sustainable resource management and citizen-centred service delivery. Potential contextual factors highlighted in preliminary meetings imply possible lack of commitment from top management and declining well-being.

Given that specific contextual factors are yet to be identified, we propose a general CMO configuration that draws on common patterns in public service organisations and our framework variables:

“IF there is a supportive organisational structure, clear public service mission and readiness to implement new initiatives to promote compassion [context] **THEN** the organisation will implement compassionate workplace practices that align with public service values and encourage broad employee participation [mechanisms] **AS A RESULT** employees will experience improved well-being and contribute to a more compassionate service delivery environment [outcomes].”

Organisation TL5

Organisation TL5 is a large professional services firm operating as part of a global network, with over 1,200 employees across multiple national locations. The organisation maintains high professional standards and a strong market position, emphasising employee empowerment and workplace culture development. Despite winning numerous employer awards, the organisation faces specific workplace challenges.

Initial context factors identified through preliminary meetings highlight two significant elements. The organisation experiences high employee turnover and operates with multiple distinct subcultures across different operational areas. While these present challenges, there is organisational commitment to implementing unified workplace initiatives across all divisions.

Given the current understanding of this organisation's context, particularly its turnover challenges and cultural complexity, potential CMO configurations could look like this:

“IF there is high employee turnover and support for the employees that remain and they are willing to implement new initiatives to improve their well-being [context] **THEN** the new support practices that respect cultural differences implemented will foster employee participation and utilisation [mechanisms] **AS A RESULT** employees will experience improved well-being through enhanced support access and certainty, contributing to a more unified compassionate workplace climate [outcomes].”

Organisation TL6

Organisation TL6 is a large non-profit organisation providing diverse social services, employing approximately 1,500 staff across multiple facilities and programs. Operating with a clear social mission, the organisation supports around 4,500 service users through various support initiatives. The organisation has extensive experience with innovative projects and workplace well-being programs.

Initial context factors identified through preliminary meetings show that staff face significant emotional and mental demands, particularly among team leaders and long-serving employees. The organisation operates with decentralised units, maintaining distinct cultures while already implementing various well-being initiatives, including programs addressing death and mourning. Employee motivation varies significantly based on age and length of service. The organisation's mission alignment with compassionate practices and previous research project experience provides potential advantages for implementation.

Given the current understanding of this organisation's context, particularly its combination of emotional demands and existing well-being focus, potential CMO configurations could look like this:

“IF there are high emotional demands but also established well-being initiatives and mission alignment with compassionate practices [context] **THEN** employee will perceive new support mechanisms are integrated to existing well-being programs, ensuring cross-unit coordination and participation [mechanisms] **AS A RESULT** employees will

experience enhanced well-being through coordinated support structures, contributing to a more unified compassionate workplace climate that addresses varying emotional demands [outcomes].”

Table 6 synthesises the preliminary contextual factors identified through initial organisational engagement and document analysis. These factors will inform the development of specific CWP intervention initiatives and their corresponding CMO configurations. Each factor has been evaluated as either a potential barrier or facilitator to implementation, recognising that some factors may serve both roles depending on the specific organisational context. This preliminary analysis provides a foundation for understanding how varying organisational contexts may influence the development, implementation, and outcomes of CWP initiatives.

Table 6. Summary of contextual factors for some recruited workplaces

Work-place	Sector and size	Contextual factors	Barrier/Facilitator
PS1	Primary / small	<i>Identity</i>	Barrier
		<i>Teams</i>	Barrier
		<i>Coordination</i>	Barrier
		<i>Conflicting schedules</i>	Barrier
		<i>Management support</i>	Facilitator
		<i>Young</i>	Facilitator
		<i>Trust in the HR person</i>	Facilitator
PM2	Primary / medium	<i>Organisational culture</i>	Barrier or Facilitator
		<i>Management support</i>	Facilitator
PL3	Primary / large	<i>Job insecurity</i>	Barrier
		<i>Perception of change related to restructuring</i>	Barrier
SM1	Secondary / medium	<i>Integration with previous policy / procedures</i>	Facilitator
		<i>Potential resistance to change due to family values / organisational culture</i>	Barrier
		<i>Potential differences in power dynamics in the executive team</i>	Barrier
		<i>No formal HR department</i>	Barrier
		<i>CEO a psychologist</i>	Barrier or Facilitator
SL2	Secondary / large	<i>Uncertainty due to current re-structuring</i>	Barrier
		<i>Emphasis on rules and regulations</i>	Barrier
		<i>Commitment to well-being and to research-related projects</i>	Facilitator
TS1	Tertiary / small	<i>Regional context of insecurity</i>	Barrier or Facilitator
		<i>Coordination between work units</i>	Barrier
		<i>Work unit identity</i>	Barrier

			Barrier
TM2	Tertiary / medium	<i>Identity</i>	Barrier
		<i>Teams</i>	Barrier
		<i>Coordination</i>	Barrier
		<i>Conflicting schedules</i>	Barrier
		<i>Management support</i>	Facilitator
		<i>Young</i>	Facilitator
		<i>Trust in the HR person</i>	Facilitator
TM3	Tertiary / medium	<i>Restructuring</i>	Barrier or Facilitator
		<i>Commitment to well-being</i>	Facilitator
TM4	Tertiary / medium	<i>Management support uncertain</i>	Barrier
		<i>Declining well-being</i>	Facilitator
TL5	Tertiary / large	<i>Turnover</i>	Barrier
		<i>Decentralisation and subcultures</i>	Barrier
TL6	Tertiary / large	<i>Emotional demands from job itself</i>	Barrier
		<i>Decentralisation and subcultures</i>	Barrier
		<i>Current well-being initiatives</i>	Facilitator
		<i>Previous experience with research-related projects</i>	Facilitator
		<i>Topic aligned with what they do</i>	Facilitator
		<i>Mental stress</i>	Barrier
		<i>Motivation and engagement</i>	Barrier or facilitator

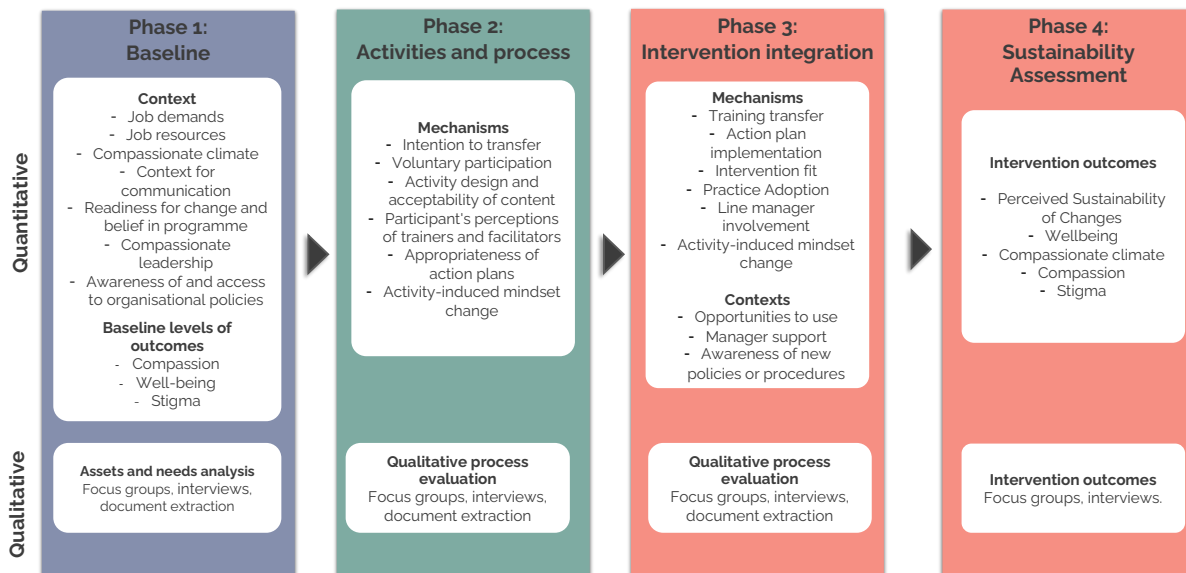
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APPENDIX 1: Outline of the different phases of process evaluation

Figure 2. Process Evaluation Framework

Evaluation phases



APPENDIX 2: Outline of the key EU-CoWork Milestones and Activities

Figure 3. Overall EU-CoWork Process

Overall process

