

Expression of Interest (EOI) Evaluation of the Heart Foundation Digital Referral Pathway (DRP)

Organisation Background

The National Heart Foundation of Australia (Heart Foundation) is a not-for-profit organisation dedicated to fighting one of the biggest killers of Australians - heart disease. For more than 60 years, the Heart Foundation has been the trusted peak body working to save lives and improve the heart health of people living in Australia. The Heart Foundation's vision is a world where people do not suffer or die prematurely because of heart disease.

Our work includes:

- Funding high-impact research, supporting emerging and leading heart health researchers.
- Working to improve heart disease prevention, detection, care, and support for people living in Australia.
- Advocating to governments and industry for increased funding and resources for heart health.
- Building community awareness about living a heart-healthy lifestyle through public health campaigns, accessible information, and resources.
- Supporting health professionals in their work to prevent, diagnose, treat, and manage heart disease.

Program Overview

The Heart Foundation Walking (HFW) program is one of Australia's largest free walking programs, helping people become more active through local walking groups and Personal Walking Plans. Established over 30 years ago, HFW connects Australians with free, fun, and social opportunities to be active. It helps provide motivation, structure, and community connection, to assist participants in achieving the Australian Physical Activity Guidelines of at least 150 minutes of moderate-intensity physical activity per week. Originally, the program was solely based around walking groups with our 'red army' continuing to walk to this day. In 2021, Personal Walking Plans were launched where Australians could sign up to a six-week personal walking plan, increasing participation to over 400,000 Australians to date.

The HFW program now has two paths for Australians to help increase their physical activity and engage in an active lifestyle.

Walking Groups

The Heart Foundation has run the core HFW program for many years. The program currently has over 61,000 regular walkers engaging with over 800 walking groups across Australia. Most walking groups are connected to a Host Organisation, which is an organisation that helps implement the program at a local level (e.g., councils, GPs, shopping centres) and is led by volunteer Walk Organisers and Local Coordinators. Around 400 new walking group participants are recruited per month, primarily through word of mouth. The demographics are skewed toward older women with 78% of walkers being female, and 65% of participants over the age of 65. The impacts for Walking Group participants are deep and long-lasting with many engaged in the HFW program long term. Our retention rates in groups remain high at 87.1% after 12 months.

Link to HFW Program Website: www.walking.heartfoundation.org.au

Personal Walking Plans

Recognising that Walking Groups are not for everyone, an individualised approach was developed through the introduction of Heart Foundation Walking's six-week Personal Walking Plans. These plans were launched in March 2021 and have been supported by paid digital marketing campaigns, primarily Facebook advertising. The first six weeks of the program saw 64,000 participants recruited and since then over 328,933 Australians have signed up to a Personal Walking Plan. The demographics are slightly younger than walking groups, with registrations being predominantly women (average age 58 years, 90% female). Results show positive physical activity behavioural change, with 74% of people completing their six-week Personal Walking Plan (2021 Survey, n=2,338) and with 69% self-reporting that they have met the Australian physical activity guidelines by the end of the six weeks.

HFW Participant Demographics

Heart Foundation Walking participants are older adults, with an average age of 59 years. The program has strong female representation, with 87% of participants identifying as female. Participation among men and younger adults aged 18- 44 is comparatively lower.

HFW Engagement spans across all socio-economic groups, with representation across the SEIFA quartiles with approximately 18% of participants residing in areas classified as most socio economically disadvantaged. The program also includes participants from culturally and linguistically diverse (CALD) backgrounds, with 7,814 registered individuals reporting a non-English language background.

Background and Context on Digital Referral Pathway (DRP)

The DRP is an online tool that allows health professionals such as general practitioners, nurses, and allied health practitioners - to refer patients or clients directly to Heart Foundation Walking. The tool aims to streamline the referral process, to support integration of physical activity promotion into clinical practice. Following referral, patients receive a six-week email journey designed to motivate them to increase their level of physical activity by joining a walking group, or to sign up for a Personal Walking Plan.

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Communication is evidence-based, designed by physical activity and behavioural change experts, designed to build long-term habits.

Current referral process by health professionals to the Heart Foundation. Walking program includes providing patients with physical flyers or directing them to visit the HFW website during the consultation process. This traditional approach relies on in-person in consultation process materials, which can limit the efficiency and reach of referrals compared to more integrated digital solutions.

Currently implementation of the DRP pilot is through a soft launch, focusing on promotion within our existing in-house communications and networks, engaging with health professional clinics that already have established walking groups or health professionals engaged with the HFW program. These targeted clinics and practitioners are being invited to trial the DRP as part of the initial launch phase (Phase 1). The goal is to leverage trusted relationships and establish participation to generate early feedback and engagement.

In terms of reach, this approach allows us to maximise initial adoption among those most likely to benefit and provide valuable insights from experienced program users. Following Phase 1, we are planning a broader national launch between January and June, which will be supported by advertisements and outreach through professional health bodies (Phase 2). The campaign will target general practitioners (GPs), primary care nurses, exercise physiologists, physiotherapists, podiatrists, occupational therapists, and other allied health professionals. By engaging these Health Professional groups, we aim to significantly expand the reach and impact of the DRP, enhancing the referral process and increasing awareness and opportunities for participation in HFW across Australia.

DRP forms part of the Heart Foundation's broader Health for Every Heart strategy to create environments and systems that enable healthy behaviours, including embedding physical activity as a key component of preventive and secondary health care. The aim of the DRP is to support health professionals in having confident conversations about walking and making referrals quick and easy.

Since its recent introduction in October 2025, the DRP has started to generate interest across the primary care and community care sectors. The next stage of development involves evaluating the effectiveness of the tool to support both health professionals and patients in practice. This evaluation will gather insights to optimise the DRP's design, communication content, and implementation approach to enhance national scale-up.

Link to Digital Referral Pathway form: [Digital Referral to Heart Foundation Walking](#)

Project Purpose

The Heart Foundation seeks an independent evaluator to evaluate the DRP. The purpose is to assess its effectiveness, usability, and behavioural impact on health professionals and consumers.

The purpose is to assess the effectiveness and usability of the DRP for health professionals currently using the tool, and to evaluate the clarity and resonance of the EDM journey from a consumer perspective. Although we are not directly collecting feedback from current consumers during this phase, we will obtain consumer perspectives by conducting focus testing with a group that mirrors the expected HFW participant

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profile. This approach will help us understand how clear and engaging EDM communications are for potential consumers.

The evaluation will also identify practical recommendations for refinement and national rollout.

Evaluation Scope and Objectives

The evaluation will focus on the period from November 2025 to April 2026, capturing early implementation and adoption of the DRP. During this pilot phase, evaluation activities will center on feedback from health professionals regarding the usability of the tool, its integration into clinical workflows, and levels of engagement with the pathway. In addition to qualitative insights from health professionals, the evaluation will analyse de-identified engagement analytics from associated electronic direct mail (EDM) campaigns to understand referral journey performance and communication effectiveness. This evaluation phase will not collect feedback directly from referred participants; instead, an engagement in a consumer focus-testing group is expected to be arranged through the marketing research/evaluation agency to recruit participant cohorts and test the clarity, content, and resonance of the EDM journey from a consumer perspective. Findings from these activities will inform refinement of both the DRP and associated communications ahead of broader rollout.

Objectives include:

- Evaluate whether the DRP acts as an enabler for health professionals to refer patients to Heart Foundation Walking.
- Assess integration of the DRP into clinical workflows.
- Examine the clarity, tone, and motivational effect of the consumer EDM journey.

Evaluation Questions

The evaluation should address the following key questions and sub-questions:

Evaluation Focus Area	Key Evaluation Questions
Health Professional Experience	<p>How effectively does the DRP enable and simplify the referral process?</p> <p>What barriers and enablers influence uptake and use?</p> <p>How well does the tool fit within existing clinical workflows?</p>
Cohort Focus Testing	<p>Are EDM communications clear, motivating, and engaging?</p>

	<p>How do consumers prefer to receive these messages via SMS or email</p> <p>Does this referral process encourage participation in Heart Foundation Walking?</p>
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Proposed Methodology

The evaluation should employ a mixed-method approach integrating qualitative insights and existing data sources. The proposed methodology may include:

- Conduct a desktop review of program materials and analytics.
- Undertake semi-structured interviews or focus groups with health professionals using the DRP and people who belong to cohort that are likely to be referred to Heart Foundation Walking. Undertake semi-structured interviews and online focus groups with health professionals using the DRP and with potential consumers based on the demographics of our users test the online journey materials.
- Perform thematic and behavioral analysis of responses.
- The evaluator is responsible for ensuring ethical conduct, maintaining data quality, and triangulating findings to enhance the credibility and reliability of results.

Support and Resources Provided by the Heart Foundation

The Heart Foundation will provide:

- Program documentation, communications, and EDM content.
- Access to de-identified dashboard data on DRP referral activity when required.
- Support for professional health participant recruitment.
- A demonstration of the DRP tool and access to a test environment.
- Ongoing project liaison, feedback, and approval of deliverables.

Ethics and Confidentiality

The evaluation must comply with the principles of ethical conduct including voluntary participation, informed consent, and data confidentiality. The Heart Foundation will identify a preferred ethics approval provider; however, the contracted evaluator is responsible for managing the ethics application process and ensuring all evaluation activities receive appropriate review and approval. The Heart Foundation will allocate a dedicated budget to support this process, enabling timely and compliant ethical review as required.

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All data provided by the Heart Foundation will be de-identified and aggregated. Privacy Collection Notices will be used to obtain informed consent from all participants. Evaluators should adhere to the ethical guidelines set out by the Australian Evaluation Society and the Belmont Report principles.

Budget and Evaluation Criteria

The total budget for this engagement is up to \$47,500 (ex GST), covering all costs related to design, facilitation, ethics approval, focus testing (including participant fees for health professionals and consumers), analysis, and reporting. EOIs will be assessed based on:

- Experience in evaluating health, behavioural-change, or digital engagement programs.
- Understanding primary care and consumer engagement.
- Methodological soundness and appropriateness.
- Value for money and quality of deliverables.
- Demonstrated ability to meet project timelines.

Proposed Timeline

Date	Activity
1/12//2025	Expression of Interest (EOI) Opens
16/12/2025	EOI Closes
19/12/2026	Evaluator announced
16/01/2026	Evaluator contracted
By 23/01/2026	Inception meeting
26/01/2026 – 13/02/2026	Contractors to: Develop Data Collection Tools and prepare Ethics Application Documentation
February 2026	Submit Ethical Clearance
March – May 2026	Data collection: health professionals (HF to assist the contractor with recruitment) Data collection: consumer testing (contractor to recruit to ensure reliability) Digital data supplied by the HF Data analysis: health professional, consumers, digital data Analysis
18/05/2026	Draft Evaluation Report Submitted
08/06/ 2026	Final Evaluation Report Submitted

Risk Management

The Heart Foundation is committed to initiative-taking risk management to ensure the successful delivery of the DRP evaluation. Anticipated risks include challenges in recruiting enough health professionals or consumer cohort participants resulting in an underpowered evaluation unable to produce meaningful

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conclusions, potential delays in obtaining ethics approval, and technology or data access issues. To address these, the following strategies will be implemented:

- **Recruitment:** The evaluator will be required to engage a reputable third-party market research firm or project team to support the recruitment of the target consumer cohort, ensuring robust and representative participation and minimising the risk of low response rates.
- **Ethics Approval:** A preferred ethics approval provider has been identified and a dedicated budget allocated, enabling an efficient and timely review process to avoid unnecessary delays.
- **Technology and Data Access:** The Heart Foundation will provide access to all necessary program documentation, communications, dashboard data, and a demonstration of the DRP tool to facilitate smooth data collection and analysis.
- **Contingency Planning:** Regular project liaison and feedback mechanisms will be established to identify and address emerging risks promptly, ensuring the evaluation remains on track and aligned with project objectives.

These measures are designed to uphold the integrity of the evaluation and support the achievement of all deliverables within the proposed timeline.

Submission Process and Contact

Interested organisations and researchers are invited to submit an Expression of Interest outlining their proposed approach, team expertise, budget, and timeline. EOIs should be submitted electronically as a Word or PDF document.

Please send your submission to: Senior Health Professional Engagement Officer – Heart Foundation
Email: Abhai.Dhillon@heartfoundation.org.au | PH: 02 8922 2318

All EOIs must be clearly titled: “Expression of Interest – Heart Foundation Digital Referral Pathway Evaluation”. The Heart Foundation reserves the right to accept or reject any submission and to negotiate with preferred respondents.