

HEALTH WEALTH CAREER

HERO EMPLOYEE HEALTH MANAGEMENT (EHM) BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER®

BECOME A HERO IN YOUR
ORGANIZATION!

worksite wellness
council
of massachusetts



October 29, 2015

Mimi Tun, Mercer

MAKE TOMORROW, TODAY  MERCER

HERO EHM BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER©

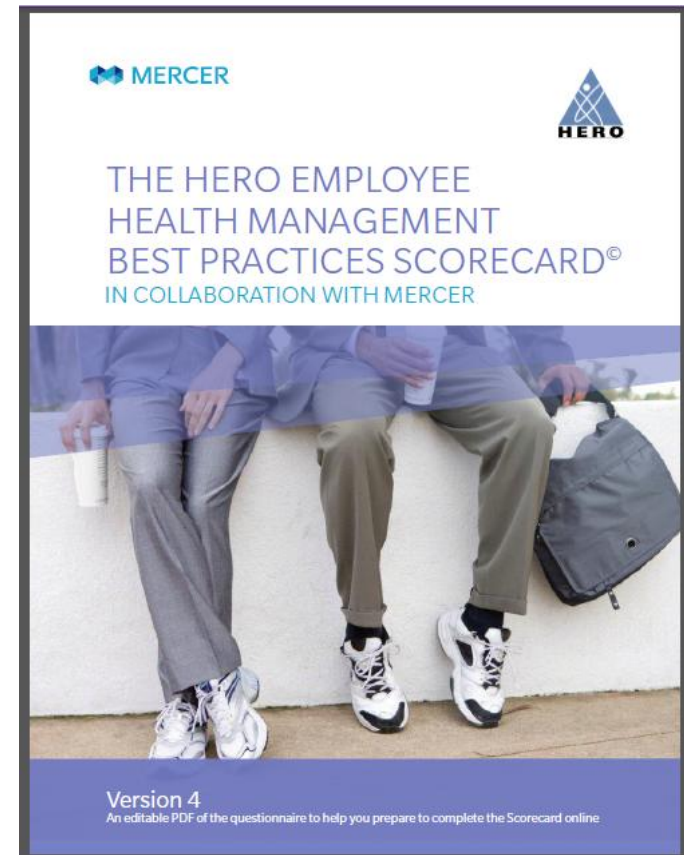
HERO Scorecard Program and Workshop: Become a HERO in your organization! 🏠

- Learn about the HERO Scorecard
- Maximize the value of Scorecard
- Use analysis and research findings to gain support



HERO EHM BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER® BRIEF INTRODUCTION

- Designed to be an educational and best practices assessment tool for employee health management (against national, employer size, and industry benchmarks)
- Over 1,200 employers have completed the Scorecard since first launched online in 2009 (this was Version 3)
- Over 350 employers have completed the next generation Scorecard since it was re-launched in 2014 (current Version)

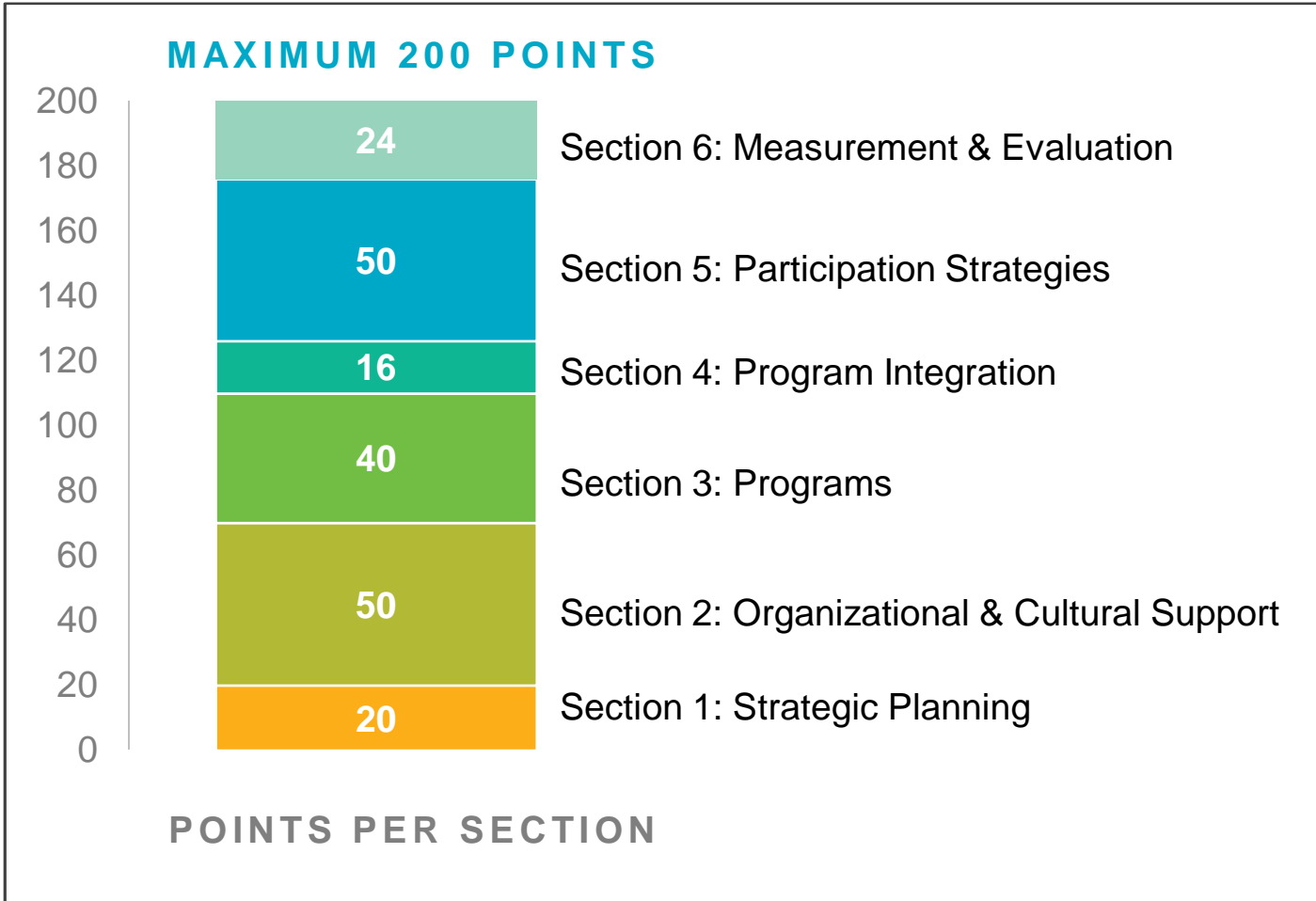


WHAT MAKES THE SCORECARD “NEXT GEN”?

The world has changed: new practices have emerged; and we’ve learned a lot from the Scorecard data

- New questions
 - Incentives, including outcomes-based incentives and intrinsic reward strategies
 - Engagement strategies including use of new technology and social networking strategies
 - Program integration
 - Quantitative program outcomes measures
- Incorporate learnings about practices that have biggest impact
 - Emphasis on culture and workplace support
 - Reallocation of number of questions and points allocation

HERO EHM BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER® BEST PRACTICE DOMAINS AND SCORING



- Optional Outcomes
(not scored)**
- Participation Rates
 - Employee Assessments
 - Health Measures
 - Lifestyle Behaviors
 - Financial Impact

HOW IT WORKS



- Employers access the Scorecard online, free of charge, through the HERO website or a Preferred Provider*
- An editable PDF allows employers to easily share the Scorecard and gather input from different stakeholders within the organization
- Final responses are submitted online
- The organization's best practice score is calculated automatically and sent by e-mail to the organization, along with national norms

* Preferred Provider Network includes Alere, BCBS of ND, Capitol Bluecross, Healthyfit, Healthyroads, Kaiser Permanente, Mayo, Mercer and Staywell currently.

DATA SECURITY



- Individual responses are kept strictly confidential
- The online data collection tool and scoring system are maintained by a third-party vendor and hosted on its servers, under the supervision of Mercer
- Aggregated data (without company identifiers) is used for normative and research purposes
- Any use of individually identifiable data – for research or other purposes – requires the respondent’s prior written consent

BENEFITS FOR EMPLOYERS



- **Inventory of best practices:** Review the current best thinking on what makes EHM successful
- **Indicator of program success:** Compare the organization's scores with national averages and the organization's past scores
- **Collaboration aid:** During Scorecard completion and scoring discussions, build consensus and a common framework for addressing improvement opportunities
- **Comparative/Benchmarking tool:** Benchmark against industry and peers
- **Planning tool:** Use during program evaluation/design, gap analysis, strategic planning and vendor selection

BENEFITS FOR INDUSTRY



- **Source of industry trends:** Increasingly a source of information about what practices employers are adopting with ability to track trends over time
- **Research database:** Database is tapped for original research studies and for quarterly commentaries on best practices
 - ❑ 2013 validation study published in JOEM
 - High scorers had -1.6% claims trend over three years
 - ❑ Published 20+ commentaries based on analysis of Scorecard data

MAXIMIZE THE VALUE OF THE SCORECARD BEST PRACTICES

- Involve multiple people who know about your EHM programs: HR/benefits, wellness, finance, communications, health services, disability, safety, etc.
- Use the “pdf” version of the Scorecard to review questions and prepare answers
- The User's Guide can help you better understand the questions
- Be sure to “Save” an electronic copy for your record
- Review the scores with your team!
 - Contact HERO or a Preferred Provider for additional benchmarks
- Use the best practices listed in the Scorecard to review or revise your EHM strategy
- Re-visit the Scorecard – take it again if there are changes or include it as part of your annual planning

MAXIMIZE THE VALUE OF THE SCORECARD INFORM EHM STRATEGIC PLANNING

Organizations with a **strategic plan** for their employee health management program reported higher participation rates, better health outcomes, and better health care cost containment.¹

1. Begin with end goal in mind

- What do you hope to achieve?
- Align EHM goals with organizational goals.

2. Collect and analyze data

- Sources include workforce health measures, employee survey data and business measures or organizational assessment data.

3. Identify evidence-based strategies and programs

- Draw from HERO Scorecard resources and tailor to fit your organization's priorities.

4. Build support for strategic plan with stakeholders

- Share and vet the strategic plan with stakeholders.
- Ensure strategic plan address stakeholder needs & supports their goals.

5. Review strategic plan and update it regularly

- Update strategic plan annually.
- Build into the annual program and budget planning cycle.

MAXIMIZE THE VALUE OF THE SCORECARD ENGAGE STAKEHOLDERS

Initially

Stakeholders may include HR/benefits, wellness, finance, communications, health services, disability, safety, etc.

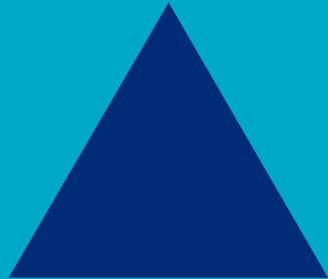
- Communicate what's in it for them
- Value their opinion/expertise
- Invite them to discuss questions prior to submitting your organizations answers
- Invite them to a strategy review and planning meeting

Sustain

- Keep stakeholders informed
 - Program results
 - Opportunities for improvement they can impact
- Invite their occasional feedback
- Encourage their active/visible participation
- Give them recognition!

HERO EHM BEST PRACTICES
SCORECARD IN COLLABORATION
WITH MERCER®

HIGHLIGHTS OF RESEARCH AND
ANALYSIS FINDINGS



HERO SCORECARD VALIDATION STUDY (2013, JOEM)

HERO Scorecard “High” scorers had -1.6% claims trend over three years

JOEM • Volume 56, Number 2, February 2014

HERO Scorecard Validation

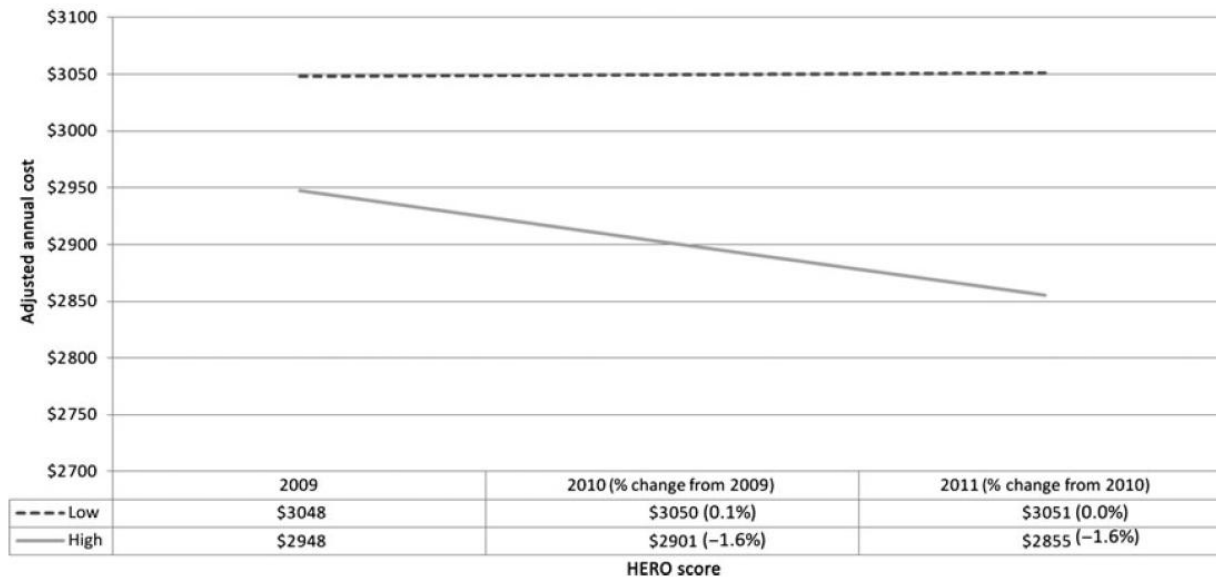


FIGURE 4. Predicted average annual health care expenditures (adjusted to 2012 dollars) for organizations with high and low HERO scores.

Source: The Predictive Validity of the HERO Scorecard in Determining Future Health Care Cost and Risk Trends, JOEM Volume 56, Number 2, February 2014

HERO SCORECARD STRATEGIC PLANNING

Employers are placing a greater emphasis on strategic planning

	Version 4	Version 3
Have a formal, written strategic plan	57%	44%
Among those, the plan includes objectives for:		
Participation rates	82%	85%
Change in health risks	63%	67%
Employee satisfaction / morale	55%	
Cost savings (or other financial objectives)	53%	52%
Improvement in clinical measures	46%	52%
Winning EHM program awards	41%	
Productivity gains	22%	23%

V4 HERO scorecard data as of September 30, 2015

ORGANIZATIONAL AND CULTURAL SUPPORT CREATING A CULTURE OF HEALTH AND WELL-BEING

When leaders participate in EHM programs, participation rates are higher and outcomes are better.

- No improvement in this best practice
 - Version 3 (53% of respondents said leaders actively participate) to Version 4 (51%).
- Only 20% respondents say that leaders are role models for prioritizing health and work/life balance
- Only 17% of respondents say leaders are held accountable for supporting health and well-being of employees
- 55% of respondents now have wellness champion networks, compared to 30% a few years ago
- Physical work environment + work policies
 - 66% of respondents have a tobacco-free workplace or campus
 - 68% have easily accessible healthy eating choices
 - 67% have features that explicitly encourage physical activity but 28% have policies that allow employees to use work time for physical activity
 - Little over 30% encourage stress management or mental recovery breaks

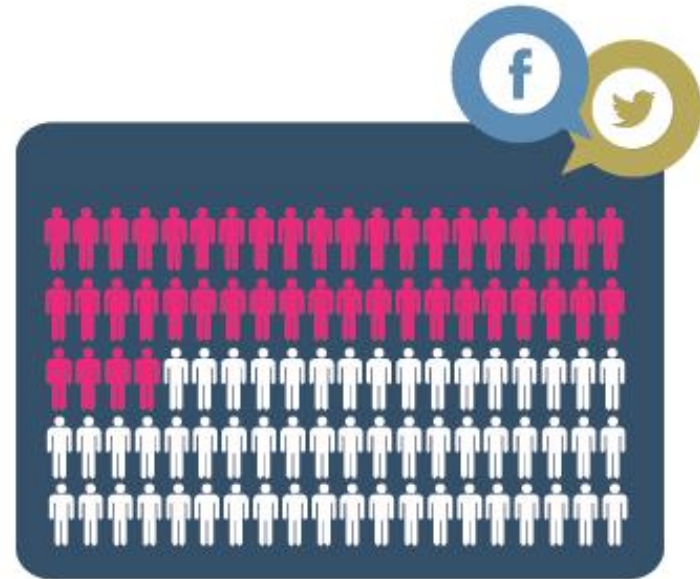
PARTICIPATION STRATEGIES DRIVING RESULTS

Financial incentives help drive participation rates, but communication efforts are even more strongly related to positive health and financial outcomes.

- 69% of respondents offer financial rewards or penalties in connection with the health management program
 - When financial incentives are provided, how can they be earned?
 - Participating in programs: 93%
 - Achieving/progressing toward health status targets: 41%
 - Completing activities (e.g., 10,000 steps): 49%
- 37% focus intrinsic motivation for reward as a primary focus of engagement strategy
- Branding the EHM program with a unique name and logo was found to be especially helpful in earlier analyses: 63% of respondents now use this tactic, up from a few years ago (65%)

Version 4 HERO scorecard data as of September 30, 2015

PROGRAMS AND PARTICIPATION STRATEGIES BY THE NUMBERS



Opportunity for further study

Version 4 HERO scorecard data as of September 30, 2015

PROGRAM INTEGRATION IMPROVING MEMBER EXPERIENCE AND OUTCOMES

Integration refers to the process of identifying an individual's health needs and connecting him or her with all appropriate EHM programs and services with the goal of a **seamless end-user experience** across multiple internal or external EHM partners.

- Do EHM partners provide “warm transfer” of individuals to programs and services provided by other partners?
 - 33% of respondents say yes
- Are EHM programs are integrated in some way with behavioral health?
 - 37% to 46% are depending on the EHM program
- Is EHM integrated to at least some extent with disability programs?
 - 22% say yes

When EHM Programs are integrated and coordinated, employers report better health results.

Version 4 HERO scorecard data as of September 30, 2015

MEASUREMENT AND EVALUATION DATA DRIVEN PERFORMANCE MANAGEMENT

Despite some progress, measurement and evaluation remains challenging

	Version 4	Version 3
Data management and evaluation efforts are effective or very effective in improving program	52%	43%
Data captured and used to evaluate EHM program		
Participation data	76%	73%
Health care utilization, cost	60%	56%
Health risk, status	52%	50%
Participant satisfaction	49%	40%
Productivity, presenteeism	12%	11%

Version 4 HERO scorecard data as of September 30, 2015

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HERO Scorecard Program and Workshop: Become a HERO in your organization! 📅



- Call to Action
 - Review the resources
 - Plan on completing the Scorecard
 - Use the Scorecard and results to further your cause
 - Strategic planning
 - Engaging stakeholders
 - Closing some gaps with best practice tactics
 - What are your goals?

HERO EHM BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER® WHERE TO FIND RESOURCES



www.hero-health.org/scorecard/

• www.mercer.com/hero

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Annual Report

HERO shares insights from the Scorecard data.

Quick Facts

Key findings from the Scorecard Annual Report

Want all the Details

Find the background on the Scorecard's development

Take the Scorecard

Jump directly to the online Scorecard

Scorecard



HERO Employee Health Management (EHM) Best Practices Scorecard in Collaboration with Mercer.

The HERO Employee Health Management (EHM) Best Practices Scorecard is designed to help organizations learn about EHM best practices – and discover opportunities to improve their programs and measure progress over time.

Developed in consultation with leading authorities on EHM, this industry leading tool provides you with an instant assessment of how your program stacks up to others in the national Scorecard database.

[Take the HERO Scorecard](#)

Best Practices and Tools

Not ready to jump in? Here are best practices, practical advice and some helpful tools for using the Scorecard Steps for getting the most out of the Scorecard.

Click on any circle for more detail in that step.



THE HERO EMPLOYEE HEALTH MANAGEMENT (EHM) BEST PRACTICES SCORECARD IN COLLABORATION WITH MERCER®

[HOME](#) > [What We Do](#) > [Health](#) > [Specialty Health and Wellness Benefits](#) > [Hero](#)



INTRODUCTION

HERO WEBSITE

MORE INFORMATION

2014 ANNUAL REPORT

CONTACT US

COMPLETE SCORECARD

Welcome to the latest version of the HERO Employee Health Management (EHM) Best Practices Scorecard in Collaboration with Mercer ("Scorecard").

The Scorecard is designed to help you learn about and determine EHM best practices. The original Scorecard, which was created by a broad panel of industry experts in 2006, has been updated several times to reflect the evolving EHM field. The HERO Scorecard Version 4.0 (launched June 2014) is the result of more than a year of discussions among a panel of EHM experts and incorporates what we've learned about which best practices have the biggest impact from analyses conducted using the extensive database created from Version 3, as well as recently published research. It also covers practices that either didn't exist or were just emerging when Version 3 was created, and takes into account the continuous feedback we have received from users and industry thought leaders.

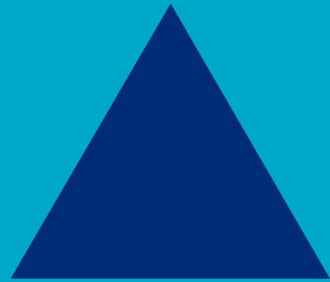
WHY COMPLETE THE SCORECARD?

First, the questions themselves serve as an inventory of EHM best practices and, as such, may contribute to your organization's strategic planning. Second, when you submit the Scorecard online, you'll instantly receive an automated email response, free of charge, with your organization's best practice scores compared to national averages. You can also complete the Scorecard again to track progress over time. Finally, by sharing your organization's information, you'll be helping to build a major national normative database to further the industry's understanding of best-practice approaches to EHM. Numerous analyses of data from Version 3 of the Scorecard have been published — including articles in peer-reviewed journals. As the Version 4.0 database grows, benchmark reports will be able to allow employers to compare the details of their programs with those of relevant benchmark groups based on industry, employer size, and geography.

[COMPLETE THE SCORECARD HERE >>](#)

Before completing the Scorecard online, [download the PDF of the Scorecard Questionnaire](#). The PDF of the Scorecard may be useful in gathering information to assist with completing the online survey but should not be submitted.

QUESTIONS?



WHO WE ARE

Mercer is a global force of 20,000 unique individuals with a passion for enhancing the health, wealth and careers of more than 100 million people worldwide. We're united by a single idea - to make lives better tomorrow through actions we can take today.

MAKE  **MERCER**
TOMORROW,
TODAY