

► **Strategic Employer Wellbeing:**  
*Tactics & Strategies that Change Cultures and Deliver Results*

Wellness Council of Northeast Ohio  
October 10, 2017

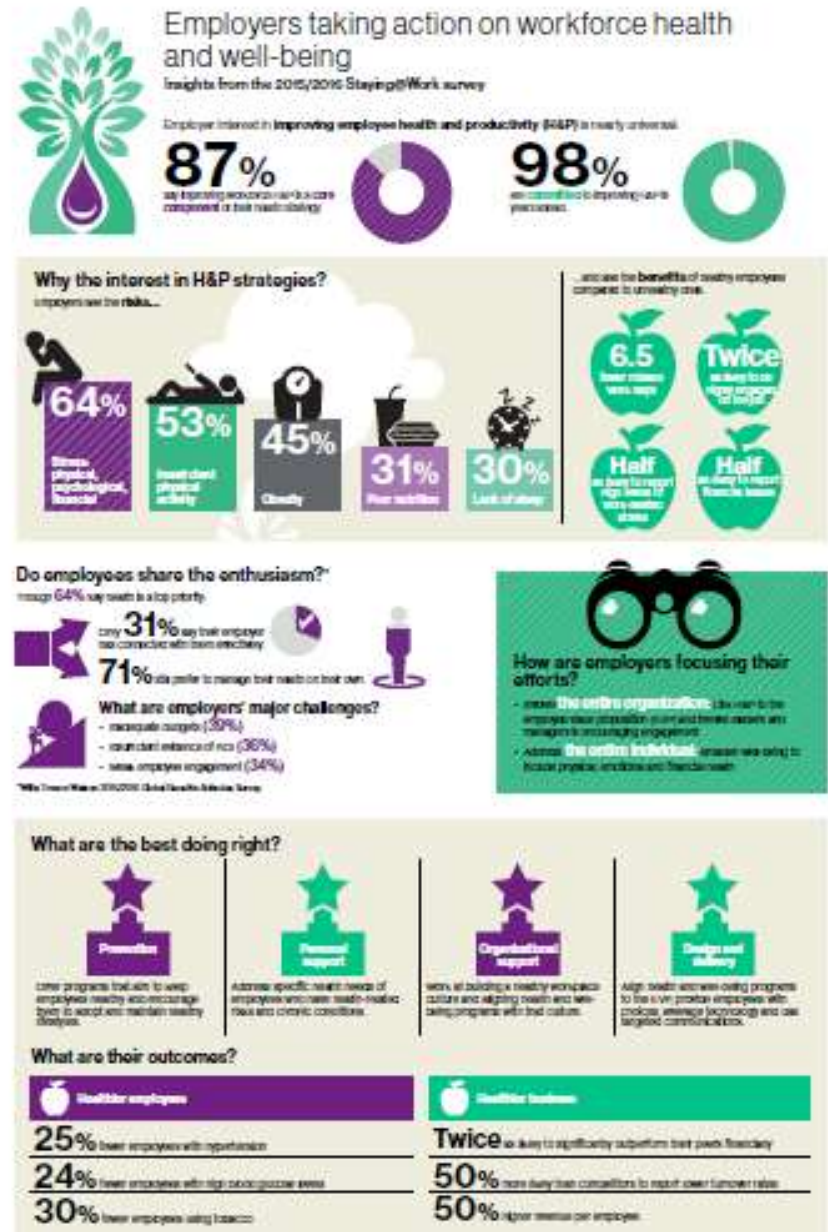


## ▶ Today's Agenda

- Organizational wellbeing update
- Best practices for wellbeing initiatives
- Wellbeing models
  - Individual
  - Organizational
  - Culture change approach
- Business case for wellbeing
- Measuring results
- Case study

## Wellbeing Update

- Increasing connection of organizational culture to wellbeing
- Continue addressing sedentary lifestyle factors, obesity, and stress to impact health care costs and productivity
- Finding new ways to incentivize related initiatives beyond financial incentives
- Investing in measurement and analytics to assess ROI, build upon what's working
- Holistic approach recognizing linkage and complexity among wellbeing aspects (stress, financial, emotional, physical)
- Making it easy to be healthy at work – focusing on a healthy work environment



## ► Wellbeing Approaches

### What are employers doing to support wellbeing?

- 77% intend to increase the number of **wellbeing programs** and activities offered
- 36% allow employees to take time away from work during the day for **physical activity**
- 28% allow employees to take time during the workday to **reduce stress**
- 60% make **healthy food choices** available in the workplace
- 57% have implemented **tobacco-free** workplace policies
- 46% use tracking devices and **wearables**, such as pedometers, glucometers and automated scales (used for transmit biometric data directly to a data repository for people with congestive heart failure, obesity and/or diabetes)
- 39% enable employees to engage with the workplace wellness program via their smartphone or **mobile device**
- 44% use some sort of **social media** or social challenge to increase engagement and participation

## ► Individual Wellbeing Model: 5 Essential Elements



## ► Organizational Wellbeing Model: HERO

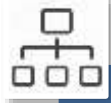
- **Assessment & planning** means developing and using a formal, written strategy to guide the initiative
- **Support** refers to people resources (including top leadership, steering team, project team, and champions) in developing a culture of wellbeing
- **Programs and integration** are the activities and tools provided to support wellbeing, and the extent to which these are integrated with broader initiatives (such as safety)
- **Participation strategies** refer to communications and rewards (incentives) designed to engage people in caring for their wellbeing
- **Measurement** refers to methods for assessing the initiative

# ► Organizational Wellbeing Model: HERO



## Assessment and Planning

- Wellness program assessment
- Compression Planning
- Focus groups
- Interviews
- Surveys
- Business case development
- Communication strategy



## Support

- Governance model
- Committee design and facilitation
- Champion network establishment and facilitation
- Project management



## Programs and Integration

- Vendor evaluation
- Vendor management
- Linking wellness and safety
- Food strategy
- Environmental assessments



## Participation Strategies

- Incentives design
- Communications
- Turnkey programs



## Measurement

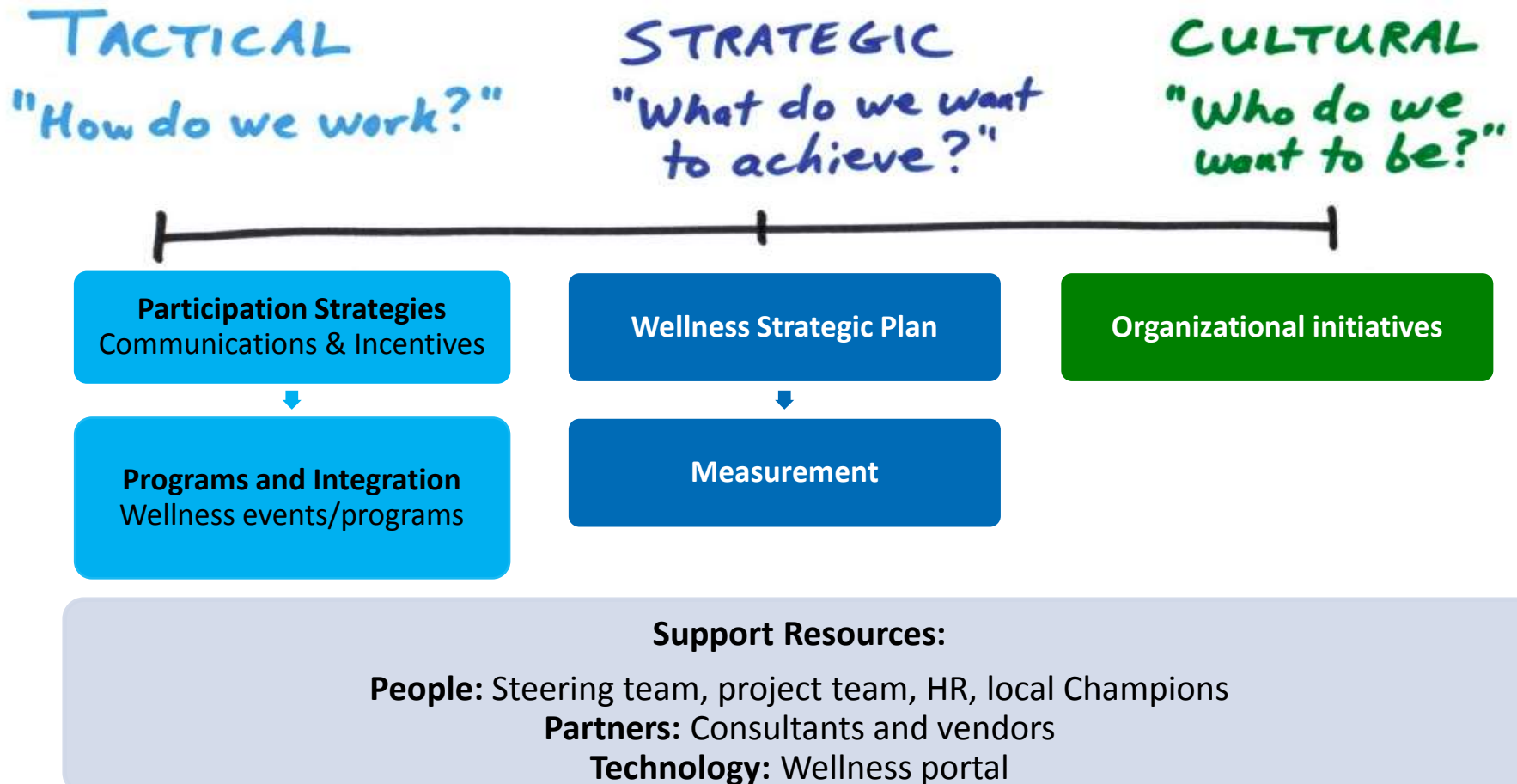
- HERO scorecard
- VOI analysis
- Visual report cards
- Population health dashboard

## ► Culture Change Model





## ► Culture Change Model applied to Wellbeing



## ► How to Transform from Wellness to Wellbeing

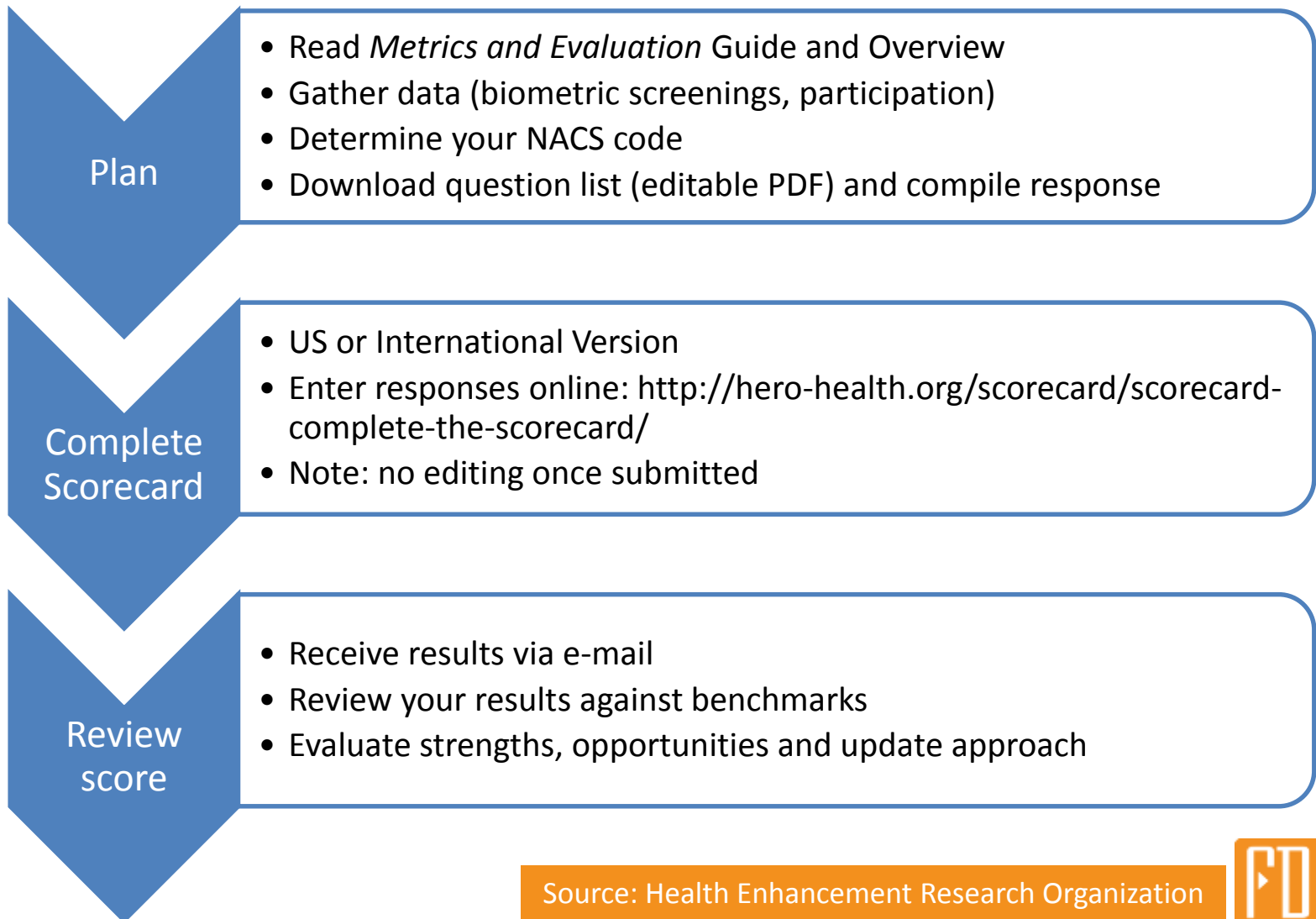
HERO Framework	Transactional Wellness Program	Transformational Wellbeing Culture
Strategic Planning	Series of activities, “Wellness Program”	Written strategic plan agreed to by senior leaders and wellness team with tactical plan
Support	HR/Benefits Program	Wellness embraced as organizational objective by all leaders
Measurement	Aimed at reducing health care costs	Focused on broader organizational objectives
Participation Strategies	Limited engagement – participation-based	Meaningful incentives – outcomes-based to reduce risk and improve health
Measurement	Minimal measurement and reporting	Key indicators measured across organization; goals and reports designed with action in mind
Participation Strategies	Limited communications – topical and programmatic	Ongoing communications and change management, cascaded from leaders
Support	Transactional vendors (screening/assessment)	Strategic vendor partners (screening/assessment, tobacco testing, portal, communications, programs)
Programs & Integration	Local programs	Corporate-directed, sponsored, and local programs
Programs & integration	Preventive care and tobacco cessation	Robust clinical support (coaching, disease management, integrated care)

## ► Business Case for Wellbeing

**“Wellbeing is about the reasons one wishes to be alive.”**

- Making the business case for wellbeing: HERO Scorecard
- Those who complete the scorecard with high scores (demonstrating effective, holistic approaches):
  - Enjoy better financial performance compared to the S&P index
    - Stock appreciated 235% (159% average)
    - Outperformed average in 67% of quarters
    - Had earnings ratios of 1.29 compared to 1.27
  - Have 1.6% lower medical cost trends compared to average scorers
- Wellbeing approach addresses root barriers to health on an individual basis
- 66% of people are doing well in at least one of the 5 aspects of wellbeing – 7% are thriving in all five
- Improving wellbeing across all aspects has a cumulative effect on happiness
- Removing barriers to create intrinsic motivation has a lasting effect on healthy habits

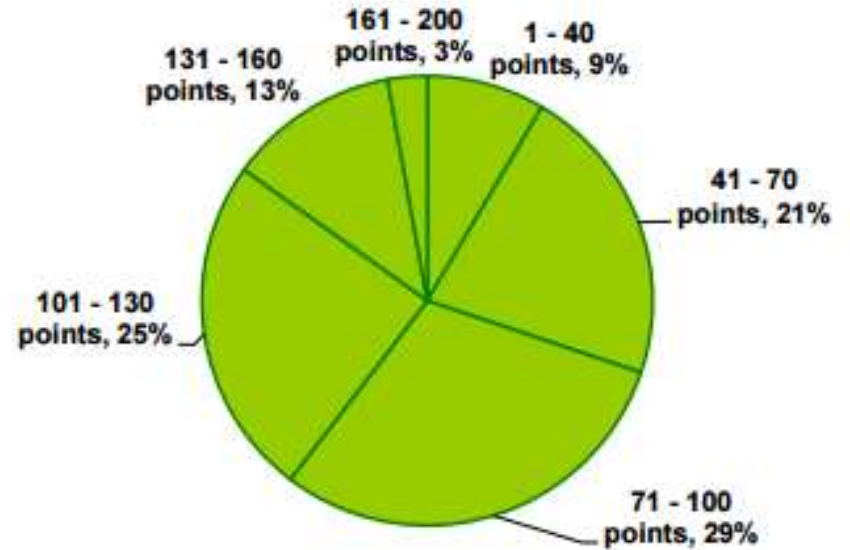
## ▶ Measuring Results: HERO Scorecard Process



# ▶ Measuring Results: HERO Scorecard Benchmarks

Section	National average	Max # of points
Strategic Planning	10	20
Organizational & Cultural Support	24	50
Programs	22	40
Program Integration	5	16
Participation Strategies	22	50
Measurement & Evaluation	9	24
<b>Total Score</b>	<b>91</b>	<b>200</b>

**DISTRIBUTION OF SCORES ACROSS RESPONDENTS**



## ► Transitioning to a Wellbeing Focus

### 1. Commit to creating a wellbeing culture

- Develop a strategic plan
- Get support from key leaders and supervisors; ask them to model behavior
- Acknowledge health as a key factor to organizational success
- Evaluate policies, work practices, and the physical work environment

### 2. Create an engaging employee experience

- Deliver programs that focus on positive opportunities for living a better life instead of dwelling on health risks
- Offer something for everyone – all 5 aspects of wellbeing
- Use technology (portals, wearables)
- Instead of adding more things to do, make it easy to be healthy at work: tobacco, food, ergonomics (walkable campus, standing desks), flexibility (PTO, flex time, scheduling), supportive management and staff

### 3. Design effective incentives and support for developing long-term behavior change and intrinsic motivation

### 4. Establish metrics: VOI instead of ROI

- Free HERO scorecard - a great place to start



## ▶ How High-Performing Organizations Succeed

- Create a strategy to plan best approach and measure participation in and effects of wellness program
- Offer a variety of programs on all aspects of wellbeing with a variety of user-friendly tools that empower informed health choices
- Foster a workplace environment that links physical, emotional, and financial health with individual and workforce productivity
- Make it easy to be healthy at work: movement, tobacco-free, food, stress management
- Rely on the latest technology to engage, support, measure, and analyze programs
- Clearly and regularly communicate the benefits of engaging for the individual, family, and organization to earn trust



## ► Discussion & Next Steps



## ► Thank You

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