Jerry’s Notes

It was an exciting week at the 2014 HERO Forum as 500 professionals came together in San Diego September 30th - October 2nd, setting a new Forum attendance record for the third year in a row. Our thanks go to the many who made the conference a success—the presenters who formed a world class faculty, the staff who managed the event so smoothly, our interns from American University, Columbia University, Johns Hopkins University, the University of Kentucky, the University of Michigan and Stanford University, and the great group of sponsors who so generously supported the conference. For those who attended the Forum, you can access the presentation slides from the HERO website home page. These slides will be available there for 90 days, and then will be moved to the HERO Member Resource Center.

On the day prior to the Forum, HERO co-hosted a meeting of wellness professionals from more than 50 universities that met to share their experiences and best practices in providing employee health management programs to their faculty and staff. If you represent a university and are interested in attending this gathering in 2015 please contact LaVaughn Palma-Davis at lvp@umich.edu.

That same day, we co-hosted the first HERO Summit on Global Health in collaboration with the Global Healthy Workplace Awards, the International Association of Worksite Health Promotion and the Institute of International Health Promotion. Based on the attendance and strong support for this program, we are planning to offer a similar session in 2015. As part of our entry into the global worksite health arena, HERO and Mercer are teaming up to develop a global version of the HERO EHM Best Practices Scorecard in Collaboration with Mercer based on the new v4 that was recently introduced.

HERO members have been extremely active in the past few months. A meeting of the HERO Think Tank occurred on September 29. Topics discussed included the results of a national survey our Health, Performance and Productivity Committee recently completed that explored the attitudes of “C-Suite” leaders regarding the importance of health as a driver of performance and productivity. The preliminary report on this survey will be posted on the HERO website in early December. As its next project, the committee has created a survey for employers to share their experiences in using wearable devices as part of their employee health management program. We ask you to review the survey and encourage the appropriate person in your organizations to complete the questionnaire. We will report the findings in early March.

Good Health,
Jerry

Congratulations to the recipients of the 2014 HERO EHM Awards and the C. Everett Koop National Health Awards. The 2014 HERO Awards recipients are Dr. James Ramsey, President of the University of Louisville (HERO Executive Health Champion Award), David Hunnicutt, President of WELCOA (Bill Whitmer Leadership Award), Dr. Dee Edington, Founder & Chairman of Edington and Associates (Mark Dundon Research Award) and Dr. Rebecca Kelly, Director of the Office of Health Promotion & Wellness at the University of Alabama (Heart of HERO Award). Our congratulations also go to the winners and honorable mention organizations of the 2014 C. Everett Koop National Health Awards. The winners were American Cast Iron Company and BP America. Honorable mention went to Lockton Companies.

We hope to see you at the 2015 HERO Forum in Chicago, September 29 - October 1.
Industry Voices- Employee Health Management Programs - Do They Work?
By Ron Z. Goetzel, Ph.D.

Recently, a series of blog posts, newspaper articles, webinars and conference presentations have asked, “Do workplace wellness programs work?” By the way, when people refer to workplace wellness, they alternatively use a variety of terms, including health promotion, population health, health and productivity and employee health management (the preferred HERO term). A recent Kaiser Family Foundation Health Research and Education Trust study reported that 98 percent of large employers (those with 200 or more workers) offer at least one “wellness program.” However, when you look more closely at the data, and at what employers consider to be wellness programs, the most common initiative is encouraging flu shots, which was mentioned by 87 percent of large firms. Most health promotion experts (including developers of the HERO Scorecard) would agree that flu shots alone (plus having available an employee assistance program or online wellness resources, the next two most popular initiatives) do not constitute a comprehensive program.

With this as background, I have an answer to the question: Do workplace wellness programs work? Workplace health promotion programs do not work! I also have another answer: Workplace health promotion programs do work! You may be scratching your head and mumbling, “Ron has completely lost his mind - he is articulating two contradictory statements, within one paragraph, no less.” The reality is that both statements are true. Some workplace health promotion programs work superbly, while others demonstrate absolutely no effect. I say this having evaluated workplace wellness programs for more than 30 years. I have found that some programs are well-designed, consistent with evidence-based practices, effectively executed and properly evaluated. These programs work. On the other hand, I have also observed many well-intentioned programs that are poorly designed, executed in a haphazard fashion, strung together by random activities, inadequately resourced and not supported by leadership and employees. Not surprisingly, these programs do not work.

How do you resolve this apparent contradiction? I had the pleasure of collaborating with 21 experts in the field of workplace health promotion (many of whom are medical directors at large corporations and members of the HERO Think Tank) to address this controversy in the September 2014 issue of the Journal of Occupational and Environmental Medicine. In a peer-reviewed article, we address what we mean when we say a wellness program “works.” What are the outcomes expected from these programs? Should some outcomes (such as achieving a positive return-on-investment, or ROI) be re-considered? We also reviewed best and promising practices and how these practices may affect results. We concluded with a summary of the vital ingredients necessary for a workplace wellness program to achieve successful health and financial outcomes.

We recently initiated a project with the Robert Wood Johnson Foundation to spotlight “real-world” examples of workplace programs that work. The project, entitled “Stories with Substance,” aims to share the experiences of exemplary employers who reveal their “secrets” for designing, implementing, maintaining and evaluating successful programs. We focused primarily on companies that earned distinction by winning the prestigious C. Everett Koop Award or achieving honorable mention (www.thehealthproject.com). Stay tuned to hear more; we’ll be sharing these stories on our website and on social media.

The bottom line? It is difficult to imagine how any workplace program can achieve significant improvements in population health unless it creates a supportive culture of health. After all, comprehensive workplace wellness programs need to motivate individuals to change life-long health habits, but at the same time, employers need to create healthy environments where good health is the norm, not the exception.

Author

Ron Z. Goetzel, Ph.D.
Johns Hopkins Bloomberg School of Public Health, Institute for Health and Productivity Studies and Truven Health Analytics

Program Spotlight-HERO Interview with Vanderbilt University

For this issue of Hero on Health, we interviewed Brad Awalt and Mary Yarbrough, M.D., M.P.H. of Vanderbilt University in Nashville, Tenn. Brad is manager of the Health Plus program at Vanderbilt and Dr. Yarbrough is the executive director of Vanderbilt’s faculty/staff health and wellness programs, which includes the Occupational Health Clinic; Work/Life Connections—EAP (including the faculty/physician wellness and nurse wellness programs; and Health Plus, Vanderbilt University’s health promotion program.

Vanderbilt is the largest private employer in middle Tennessee and the second largest private employer based in the state. They have received numerous awards, including being recognized as a winner of the Best Employers for Healthy Lifestyles by the National Business Group on Health two years in a row.

HERO: What have been the keys to your success in creating an effective employee health management program?

Yarbrough: Getting employees to participate has been a key factor to our success. Roughly 80 percent of eligible employees have participated over the last five years. This engagement and participation is driven by our campus leadership. Not only is our leadership team visibly supportive and involved in the program, but they allow the wellness team to be creative in how we respond to program data. We measure everything and evaluate outcomes data on an ongoing basis. Our leadership team allows us to use that
data and knowledge to develop creative strategies that will continue to drive participation. So, ultimately, we’re continually feeding data back into our program and evolving it to meet our unique needs.

Over the years, we’ve also learned to embrace technology, which has driven additional engagement. Now, pretty much everything we do is online. We’re a bit like the L.L. Bean of academic wellness. Our program feels personal because of the technology that drives it, and because we use technology to personalize our outreach and the overall experience for employees. We also use technology to create the environmental support needed for cross promotion.

We don’t rely solely on technology to get the job done, though. Throughout the year, we meet with as many departments and University employees as possible. In fact, participation by faculty has increased, in part, because of these presentations and face-to-face contact. The bottom line is to use as many angles and channels as possible to spread the word about our program.

HERO: When you look back at your program results, what outcomes do you feel are the most significant?

Awalt: We’re moving our population from seeing health as “being perfect” to seeing health as “a journey.” A lot of people who use technology to improve their health are already healthy or in a good place with their health. We’re proud of the fact that participation in our program goes beyond these employees to employee groups who might otherwise feel disenfranchised or disconnected because of their current health status. We’ve been able to engage them and help them define their needs and their journey to better health. One thing many employees have learned through our program is that just because you look good, doesn’t mean you’re healthy.

We’re also proud of our ability to communicate with and connect with employees in multiple ways and on numerous levels. We’ve worked hard to develop a variety of channels and tools that allow us to listen, learn and respond to employees at all levels.

HERO: What lessons have you learned over the years that you can share with other companies that have made a commitment to improving employee health?

Awalt: We’ve learned so much over the years, but there are really five key things that other employers could use to improve their own employee health improvement efforts:

1. Listen to people. Appreciate the nature of people to challenge what you’re saying. Take advantage of the fact that you’re getting feedback and questions. There are great minds in the academic setting—use those resources. Do this in a framework that allows you to maintain some level of consistency, while being flexible enough to change based on feedback.

2. Stay true to your key messages, but communicate them in different ways. We try to bring in new things and try to align them with initiatives that are important to the University and the Medical Center. We’ve focused on public health topics like seat belt use and hand washing in the past, to help educate people and promote different programs on campus.

3. Remember that your program belongs to everyone. Don’t forget that your employee wellness program is for the entire organization. You should not only allow, but encourage, partnership across departments and allow people to use their expertise to promote your program. Invite the dialogue between departments to get buy-in. You all own the program.

4. Be persistent, but don’t bug people. You have to find a balance, and have compassion. Don’t make the program more stressful for the participant and don’t make it feel like a punishment. If you want to reach the spiritual part of wellness, you have to remember to be compassionate. Remember how life changing it can be for a participant to improve their health.

5. Keep your program flexible. Part of listening is being open and able to respond to what you’re hearing. So be sure to keep your program flexible enough that you can respond to what people need, both physically and emotionally.

Authors

Dr. Mary Yarbrough
Director of Health & Wellness

Brad Awalt
Manager, Faculty & Staff Wellness Program

Scorecard commentary - New and improved Version 4.0

of the HERO Employee Health Management Best Practices Scorecard now available

The data in this report was collected using Version 3 of the HERO Scorecard. More than 1,200 employers have completed the Scorecard, and many have completed it more than once to track progress over time. We’ve published 18 commentaries using Scorecard data, examining such questions as whether including spouses in key elements of the program improves participation and outcomes (it does) and how small employer programs might produce results comparable to those of large employers. Articles citing the Scorecard or using Scorecard data have appeared in peer-reviewed journals, most recently the study validating the Scorecard against actual medical cost trends in the February issue of the Journal of Occupational and Environmental Medicine. In addition, 10 organizations have signed on as Scorecard Preferred Providers, using the Scorecard with their clients and serving as our advisors, lending their knowledge and experience to ensure the Scorecard best meets employers’ needs.

To state the obvious, all of us on the Scorecard team are thrilled with how well this version of the Scorecard has been received and proud we are of its role in advancing the use of best practices in employee health management programs. Not content to sit on our laurels, we are pleased to announce a new update to the Scorecard, Version 4.0, which was released June 2014.

The HERO Scorecard Version 4.0 is the result of more than a year of discussions (and sometime debates) among a panel of EHM experts. Some new questions cover practices that either didn’t exist or were just emerging when Version 3 was created—for example, outcomes-based incentives and gamification strategies. We’ve also been able to use what we’ve learned about which best
practices have the biggest impact to shift emphasis among program areas in terms of both the number of questions asked and the number of points allocated. For example, analysis of HERO Scorecard data (as well as other research) has shown that organizations that commit to creating a comprehensive culture of health have substantially better wellness program outcomes. Accordingly, we’ve broadened the “Leadership Support” section of the Scorecard; in V4.0, it is called “Organizational Support” and includes new questions on culture, including the physical work environment.

Other key changes include:
- New questions on incentives, including outcomes-based incentives and intrinsic reward strategies
- New questions on engagement strategies including the use of mobile apps and devices, challenges, and other social networking strategies
- Updated questions on program design, including more detailed questions on lifestyle coaching
- New questions on program integration, including disability programs
- New section on program outcomes with quantitative questions permitting study of ROI/VOI
- Additional demographic questions for more precise benchmarking

While those of you who have completed the prior version of the Scorecard will recognize many of the questions, about half are new or substantially revised. In addition, we’ve made changes to the scoring system to shift points away from programs and participation strategies to organizational culture, program integration, and measurement. As a result, the same company might receive significantly different scores in Version 3 and Version 4.0 of the Scorecard. In general, scores will be lower in Version 4.0, reflecting the addition of best practices not yet in common usage.

We’re excited about the new Scorecard. Although we have to rebuild our benchmarking database with responses from Version 4, the solid infrastructure we’ve created and the learning curve we have behind us will enable us to “power up” very quickly. We believe you’ll agree that the up-to-the-minute inventory of employee health management best practices, enhanced by what we’ve learned from hundreds of Scorecard participants over the past five years, makes the new Scorecard an even more valuable tool for your organization.

Author
Beth Umland
Director of Research for Health and Benefits, Mercer

Scorecard Supporting Tools

You may have already heard that The HERO EHM Best Practice Scorecard in Collaboration with Mercer© Version 4.0 has launched. I wanted to take a moment to tell you about the tools available on the HERO website that supports the new version of the Scorecard. Here is a list of helpful tools and references and where to find them:

**User’s guide:** The updated and expanded User’s Guide provides general guidance and question by question tips for answering each question.

**Editable PDF:** When taking the Scorecard you will want to keep a complete set of your answers for future reference. Remember that the report you receive will only show you your scores and not all of your original answers. The Editable PDF will allow you to record your answers with the questions. This can also be used while you are compiling your answers before submitting.

**Scores:** Want to know more detail about your section score? You can find the score behind each question and answer.

**Your Report:** You can view a sample report and see what scores will look like before you complete the scorecard.

**NAICS or SIC Code look up:** If you don’t know your NAICS or SIC code for the Scorecard you can look it up on the NAICS Association website.

Now that you have the tools we invite you to take the Scorecard

The Scorecard tools are a living set of resources meant to help the user complete the Scorecard quickly and accurately. To continue to improve our tools and create new ones to meet the needs of the users we invite your feedback on the tools. Please send your questions on the Scorecard or any of the tools to mailto:pat.rohner@hero-health.org

HERO Committees Report

HERO committees are grouped into two categories: standing committees and study committees. The standing committees—Education, Leadership and Research—work on important initiatives throughout each year.

- The Education Committee will work with HERO staff to develop and implement a new evaluation and selection process for HERO Forum submissions. The call for proposals for the 2015 Forum will open on Nov. 1.
• The Awards Committee (part of the Leadership Committee) presented the following 2014 HERO Employee Health Management Awards during a reception at the HERO Forum: Jerry Noyce Executive Health Champion Award to James R. Ramsey, PhD, president, University of Louisville; Mark Dundon Research Award to Dee W. Edington, PhD, founder & chairman, Edington Associates, LLC; Bill Whitmer Leadership Award to David Hunnicutt, PhD, president, Wellness Council of America; Heart of HERO Award to Rebecca K. Kelly, PhD, RD, CDE, director of health promotion & wellness, The University of Alabama. The Committee now has its sights on improving the awards process for next year.

HERO study committees are created to explore health-related topics of interest to employers and convene members, collaborators and invited subject matter experts. Below is a report on the progress of the three study committees, as well as an announcement of our newest study committee.

Engagement Committee

Last month, Jerry Noyce announced the creation of a new study committee focused on the topic of engagement. More specifically, this committee will seek to define meaningful engagement in employee health management programs and to identify the factors that maximize it.

Sue Willette (Aon Hewitt) and Dan Cave (Nurtur) have agreed to co-chair this new study committee. We anticipate a kick-off meeting in late November. HERO members who are interested in joining this committee should contact Karen Moseley (karen.moseley@the-hero.org or 910.223.2510) to be added to the roster.

Health, Performance & Productivity Committee

This committee was created to explore the relationship between the health of the workforce, its impact on worker performance and ultimately the impact of health on the performance and productivity of the organization.

Recently, Jack Groppel, Jessica Grossmeier, and Nikki Hudsmith presented results of the business leader survey at Think Tank and in the closing session at HERO Forum last month in San Diego. The distribution partner organizations and respondents will receive the Business Leader Survey Report Executive Summary later this month. Other dissemination efforts will include a webinar for the distribution partners and a separate webinar for HERO members and the general public, along with an article summarizing the findings that is being drafted for submission to The Art of Health Promotion.

The research work group within the Health, Performance and Productivity Committee continues to support analysis of the business leader survey and will begin to analyze the data, including how different levels of leadership view the connection between health, productivity and performance. Two research deliverables planned for the first quarter of 2015 are a summary of health-related drivers of productivity and a “shining light” summary of best research for business leaders.

The innovation work group has been focusing on wearable activity tracking devices and has developed a survey to learn how employers are using the technology as part of their health enhancement and wellness programming. Information from the survey will be summarized and distributed to survey participants and results will be presented at the next Think Tank meeting.

Please support this work by (1) responding to the survey, and (2) passing the survey link to your network of employers. Click here to open the survey.

Culture Committee

The charge to this committee is to develop the value proposition for employers to invest in the assessment, planning, creation and maintenance of a culture that supports health and well-being within their organization. Elements of an organizational culture of health have been identified (click here to view the full list) and serve as the basis for a literature search requested by the culture committee research work group. This search, conducted by one of the librarians at the Centers for Disease Control, located 993 articles. The HERO culture committee research work group has completed initial screening of 993 articles, and is now in the process of extracting over 200 articles for closer review, with plans to produce a research summary of the literature.

Employer-Community Collaboration Committee

The Employer-Community Collaboration Committee was formed to explore the reasons why employers may want to play active roles in community health initiatives, what activities make most sense for employers to participate in, and how to go about conducting such efforts. We have branded this initiative “Healthy Workplaces, Healthy Communities.” This will give the project a broader public appeal and a framework within which to communicate about and to promote the program. To date, an environmental scan and a summary report of key learnings about the business case have been released.

Now in the final phase of the project, funded by the Robert Wood Johnson Foundation, the committee is creating a plan to disseminate the business case and encourage employers to assume a leadership role in community health initiatives. Here’s how you can participate in the effort:

• Join the “Healthy Workplaces, Healthy Communities” (HWHC) LinkedIn page - join us.
• Follow HWHC news via the HERO twitter handle: @heroehm, or search #HWHC
• Tell us about resources, initiatives, conferences, and organizations that are bringing together employers and communities. Contact Karen Moseley (karen.moseley@the-hero.org or 910.223.2510).
Attend the Population Health Alliance Forum in Scottsdale, AZ, Dec. 10-12. The program includes sessions on this initiative in the Workplace Healthcare & Benefits Institute and the Executive Leadership Institute. Click here for more information.

A website devoted to providing information for employers interested in becoming key stakeholders in the effort to improve population health in the communities where they do business is currently in development. This website, to be named the “Healthy Workplaces, Healthy Communities” website will be created and maintained by HERO and will feature information, tools and resources for businesses. The website is scheduled to go live in January 2015.

Measuring a Culture of Health Initiative

This new initiative combines aspects of both the culture committee and the employer-community collaboration committee and seeks to better understand measures currently being used to assess the concept of a culture of health. The first phase of the project produced an environmental scan that can be accessed by clicking here.

At the 2014 HERO Forum, Jeanette May, PhD, principal investigator for the project, convened a small group of subject matter experts to discuss questions about metrics that resonate with the business community. This meeting was informed by an earlier survey of community-focused SMEs. Next steps for the project will include a report of the employer and community SME feedback, followed by beta testing of the recommended metrics. If you know of a community interested in participating in the beta test, please contact Karen Moseley (mailto:karen.moseley@the-hero.org or 910.223.2510).

Author - Karen Moseley, Manager Committees and Grants

Research Update

As HERO continues to expand and add new members, we are increasingly asked how we should determine the focus of our research efforts and how the work gets done. The short answer is that HERO’s research agenda and projects are primarily volunteer-led and membership driven through the infrastructure of its study committees and the research committee. The HERO research committee is directed by the research chair and comprised of three subcommittees: the research advisory group, the measurement standards subcommittee and the research study subcommittee.

The role and structure of the groups is captured in the flowchart below. The study committees often set the foundation for HERO research projects by helping us understand what is already known about a given topic and the existing research gaps. Their work often provides the foundation for more focused research studies. The research advisory group establishes HERO’s research agenda and priorities while the research study subcommittee provides guidance and oversight of new research studies. The measurement standards subcommittee provides data from the HERO Scorecard to inform new research and also establishes standards for measurement.
Research Advisory Group

Each summer HERO invites interested Think Tank members to participate in an open discussion about HERO’s research agenda. On July 15, HERO drew 45 members to Chicago for its fourth annual meeting to identify key issues in the market, share updates on HERO research projects and discuss what new areas HERO should consider for future research. Two presentations provided context for the discussion: an overview of emerging market trends by Dr. Seth Serxner and an update on the latest employee health management research by Dr. Ron Goetzel. The active discussion that followed will inform the research advisory group’s updates to the 2014 research agenda, to be released in time for the February 10-11, 2015 Think Tank meeting in Phoenix, AZ.

Measurement Standards Subcommittee

The measurement standards subcommittee released version 4 of the HERO Scorecard in collaboration with Mercer in June 2014, and by the end of August, 80 companies had completed it. The August newsletter provided an overview of the enhancements to the questions and scoring, and in a session at the HERO Forum, Dr. Steven Noeldner from Mercer shared the results of a comparative analysis from companies that completed the earlier version 3 and the newly released version 4 Scorecard. Observed trends indicate that employers are beginning to place greater emphasis on strategic planning for their ehm initiatives; are increasing their efforts to build a culture of health through wellness champion networks, getting leaders engaged in programs and providing more onsite or near-site biometric screenings; and investing in a unique brand for their employee health management program. The recently released HERO Scorecard 2014 annual report also shares a first look at version 4 data and can be accessed at the HERO website.

Research Study Subcommittee

While the research advisory group is responsible for ongoing updates to the research agenda, the research study subcommittee provides guidance and oversight of HERO research studies and authorship of commentaries based on data from the HERO Scorecard in Collaboration with Mercer. The commentaries are shared in quarterly benchmarking reports as well as in the annual HERO Scorecard report.

Author – Jessica Grossmeier, HERO VP of Research

Global column- Announcing the 2015 Global Healthy Workplace Awards

The 2015 Global Healthy Workplace Awards will begin accepting applications on January 6, 2015 and close on February 23. Held for the third year awards will be given out by the Global Centre for Healthy Workplaces in three categories:

1. Small and medium-sized enterprises
2. Large enterprises
3. Multi-national enterprises

Two finalists from each category will be invited to the Global Awards Summit in Florianopolis, Brazil, on May 18-19 (travel and accommodation paid) where the winners will be determined. For more information on how to apply including information on the criteria, the judges and background as well as how to participate in the Global Summit can be accessed at Global Healthy Workplace. We look forward to your application.

HERO Happenings

HERO FORUM 2015 (public event)
September 29 - October 1, 2015
The Westin Lombard, Yorktown Center
Lombard, IL

HERO Think Tank Roundtable
2/10 - 11, 2015
The Marriott Buttes, Phoenix AZ

New Additions to the HERO Resource Center Library

RSS Committee posted multiple on both Phase I and II of the Standard Process Workgroup.

RSS Meeting Notes
Global Alliance White Paper