**July 19, 2016 HERO Research Think Tank**

***“Well-being and The Big How”***

**Discussion Summary and Detailed Notes**

**Summary**

**Discussion Process and Context**

* Past Research Meetings were focused on what research topics HERO should be addressing but this year’s meeting focused instead on how HERO ought to approach its work, specifically related to the topic of well-being.
* Discussion during the meeting was kicked off by a series of panels, intended to get attendees’ thinking about the discussion question that followed. Two of the panels relied on invited subject matter experts and these two panels were recorded. The recordings are available on the [HERO Member Resource Center](http://hero-health.org/resource-center/).
* A high-level overview of the meeting was published as [Meeting Proceedings](http://hero-health.org/2016/07/hero-research-think-tank-proceedings/).

**Key Themes**

* Collaboration is a HERO strength and many ideas were offered on how HERO may collaborate more effectively.
	+ Expand size of HERO by reaching out to other sectors and disciplines and pursuing more diverse organizations (e.g., west coast).
	+ Work with more organizations that are not HERO members (ECC study committee a good example of this).
	+ Work with other sectors and organizations to pool or share data to inform understanding and conduct new research.
* HERO needs a more robust approach to public relations and dissemination of key messages and committee work to members and popular media.
	+ Members recommend establishing a PR committee
	+ Members recommend leveraging PR and marketing functions within member organizations to reach mainstream media
* HERO needs to distill research into language and terms that employers understand.
* HERO needs to incorporate “voice of the consumer” into HERO initiatives. How do we measure at the individual level (Net Promoter Score concept) as well as at the organization and population levels?
* HERO needs to expand its footprint to influence organizations outside of our current membership, including other disciplines.
* HERO needs to continue to broaden its focus to work with communities.
* Continue to leverage the HERO Scorecard data to understand gaps, track trends, educate on how to close gaps, identify best practices, etc.
* Develop a way to measure HERO’s achievement of its mission and strategic goals.
* Strengthen the employer point of view and design deliverables with employer use in mind. Translate deliverables into “plain English” and make available in many different formats.

**Documentation Methods**

* The Research Meeting was structured into four interactive discussion segments
	+ How HERO could work more collaboratively to address health and well-being
	+ How HERO could better structure committee deliverables and disseminate information for meaningful use by members, partners, and policy makers
	+ How to leverage HERO members’ strengths and HERO’s organizational approaches to address well-being
	+ Additional thoughts from members on research topics HERO should address and how to conduct future dialogues regarding HERO’s research agenda
* Discussion segments occurred in small groups, with one person in each group capturing notes on a provided form. After small group discussion, each of the groups reported back key themes to the entire group of meeting attendees and these themes were captured on flip charts pages posted on the wall.
* Some of the discussions relied on large group dialogue only, with a HERO staff member capturing all feedback on flip chart pages.
* These notes represent content captured on flip charts as well as individual table discussion notes.
* Notes from all discussion topics were pooled and then categorized into key themes but comments are grouped according to the following main discussion areas:
	+ How HERO can collaborate more effectively
	+ How HERO can structure deliverables in a way that makes HERO work easier to use and share
	+ How HERO can address well-being

**Detailed Notes**

**How to Collaborate More Effectively**

*Lessons Learned from* [100 Million Healthier Lives initiative](http://www.ihi.org/engage/initiatives/100millionhealthierlives/pages/default.aspx)

* Move further upstream to look at core issues.
* Align around common goals, not competitiveness.
* Access funding and leverage sustainability learnings.
* Develop a local strategy. Empower people within an organization and connect with the community.
* Different organizations may want to start in different areas of focus. Let go of controlling everything so tightly. Define what to go after and let others figure out how.
* Use a process-driven approach to ensure connected efforts, communications, capture learnings, and evolution of an approach.
* Need champions with leadership that will fund the efforts.
* Approach is very open. Communities work in parallel because their goals are different. This is important because the goals are relevant to each community.
* Use many funding sources. Are we at HERO limited by budget? Could we collaborate on funding?
* It’s hard to commit to an initiative if you are not sure of its trajectory into the future and trust a long term commitment.
* This is a model for employer/community partnerships
* Like that communities can select their own goals and are not driven from above. Grassroots approach seems key but is this sustainable?
* An employer is a community and is a major influencer of health.
* Focuses more on joy and meaning and not just health.
* Health benefits are unevenly distributed and we need to reduce health disparities and address equity.
* Creating a well-being scale requires addressing large equity gaps.
* Collective impact occurs through a common agenda, shared measurement, continuous communication, respond accordingly to feedback.
* Start by identifying where the engine or energy is in a community so sustainability is at the heart of all you do.

*Collaboration*

* More cross-sector collaboration and shared learnings
* Bring employers into the 100 MHL initiative
* Think about the role HERO could play in 100 MHL
* Involve public health
* Be inclusive.
* Differentiate type of collaboration: broader reach beyond our employers and more diversity of thought. Get contrarians involved to push us further.
* Expand HERO’s footprint beyond its membership base and highlight HERO as a thought leader. HERO’s ECC study committee is a stellar example of this in action.
* Identify HERO’s long-standing strategic alliances and partnerships and leverage them more.
* Partner with other organizations with a common agenda like NBGH
* Partner with schools and other educational systems. We need to influence lifestyle behaviors earlier in life.
* Take HERO research to local public health organizations to inform them.
* Need to address families and go beyond employees only.
* Financial barriers are common barriers to collaboration across business units.
* How can HERO foster more active involvement by meeting attendees? Get more buy-in on objectives and agenda. Have “round robin” discussions. Set expectations up front that everyone will provide input.
* There are problems with entities having varying agendas and spend a lot of money on awareness and a few events but this is not sustainable. Need to consider the concept of readiness – are entities ready to focus? How are you learning and moving and pivoting where you need to go?
* Use a participatory process that is highly inclusive, respectful of diversity, promotes continuous learning. How do we stay committed and embrace messiness?
* Consider if our system is big enough to capture collaboration
* Focus on getting the process started. Get past the financial barrier by starting the conversation.
* Have annual campaigns to work more closely with specific organizations (focused intention)
* Think BIG! Include more organizations in our work, using a systematic approach with an infrastructure to support it.
* Get HERO invited to other conversations
* Leverage the systems we have like the HERO Scorecard and get more people using them.
* Help get employers plugged into local efforts
* Articulate business case
* What is HERO’s “ticket for entry” to join our collaborative work?
* If we cannot reach collaboration with some, let’s aim for coordination. If not coordination, then cooperation.
* Collaboration is important. Cargill Scorecard: profitability, community, impact. “All change is local”
* Provide guidance on how to leverage existing tools and scorecards. Consider the concept of a “How to” wizard
* We represent the “1%” with most resources. How do we take into consideration the other “99%” who have access to less resources than us?
* Find clients to come to these HERO events to increase membership. Invite a friend.
* Provide best practices for how wellness program facilitators and coordinators can best execute wellness goals and strategies. Potential opportunity to leverage the Scorecard.
* Capture unique employer perspective. Apply best practice principles toward the 100 MHL campaign
* Do we need to be bigger in terms of members and partners?
* Need employer point of view. Do market research to get employer perspectives on prioritization and guidelines for analysis.
* Invite more industry diversity (i.e. west coast)
* How to partner with others at the workplace to address things like supervisory relationships? How do you partner with Org Development; Occupational Health & Safety; Risk Management; etc? There is a lot of research that already exists here. How do we leverage it?

*Working with Communities*

* Give a voice and linkage between communities and the actors to impact change.
* Empower local-level initiatives with local groups deciding what is needed locally and what local-level health issues are.
* Need to communicate the value proposition of community work.
* Communities don’t have to do it all. They can be doing what matters for them.
* Create shared value as an outcome – help participating organizations find shared value. Business return with community outcomes is a better place to be.
* Create a framework for engaging community partners.
* Does HERO have a role in helping communities ensure they are embodying inclusivity and equity?
* Where are the big commonalities among communities (e.g., food insecurity)? HERO may have a convening and measurement/advising role.
* Continue to shift from employer focus to community focus. Doing well for the community is not different than doing well for the employer.
* Think of HERO as a community and promote community collaboration. Aon is working with a variety of employers to bring a ready community together.
* Help with prioritization: how to establish the correct objectives in communities versus employer groups. Then launch and take action. Then sustain those efforts. Typically, funding is for a finite period and need to understand how to focus collaboration on a long term plan.
* Identify what companies are already doing – draw on experience/actions within HERO already. For example, conduct a poll to find out what employers are already doing in communities.
* How are people transitioning to leverage learning systems to grow community initiatives? Prioritize and focus on collaborations with long term thinking
* HERO could spotlight best practices of employer involvement in community health. [HERO tip: see HERO case studies on “[HealthyWorkplaces, Healthy Communities](http://get-hwhc.org/whats_working/case-studies/)”]
* Examples of success stories and how they developed their business case of collaborating with local communities to improve employee health.

*Data Sharing and Measurement*

* Create an “uber-database” of information.
* Create an all payor claims database.
* Have an effective measurement framework.
* How can we better interface with the community health assessments that are required to be done by all health systems?
* Measurement of influences on health and well-being in communities
* Form a Health Transformation Alliance to being data together to improve healthcare. Address benefits, plan design, etc.
* Measurement is too focused on cost shifting
* Create a measurement wizard which would allow the User to input variables. This could be a tool for members and/or employers. Should be customizable based on User’s unique goals and objectives. Would include best practice regarding which measures work best for various populations and environments. Purpose is to help the User to focus on what is most relevant to them.

**How to Structure/Disseminate HERO Deliverables from Committees**

*Public Relations*

* Use the Public Relations teams from the member organizations of HERO to disseminate our work
* Create a PR committee
* Go to national PR organization and leverage the community involvement aspect – push their clients to do a no-cost campaign.
* Become very tactical and limit the messages/themes.
* Create infographics and push a series of them to PR channels.
* Rebrand deliverables with “HERO Approved”
* HERO can do more PR. We need to take it to the next step and get it out into the popular press.
* We need more press/PR with main stream media.
* Need to support a response to counter-messaging in the industry
* We need more PR with the popular press outlets. Aon offered to help.
* Need funding for a PR effort but HERO could take lead on that
* Leverage private sector firms’ PR/communications/marketing resources
* HERO is missing out on leveraging the PR of member organizations. Proposal of Matt Duncan for a Committee Chair.
* Need to move the needle from research archive to voice of the market. Goal to lift up the profile of well-being in business and need a stronger initiative with relatable language. Look at Pew as a best practice example.
* Need a marketing committee to address PR
* College intern could go a long way towards creating a plan and initiating some activities. Connect to University of Minnesota Journalism program. Use to revamp website, social media, mobile, PR
* Use HERO member PR firms to spread messages
* Need timely communication to get research into the hands of practitioners.
* Translate research to relatable language for stakeholders that we wish to influence (Aon offered to help with this). Translate language intended for employees too.
* Publish findings in bite-sized sound bites more frequently. Leverage HERO Scorecard data and other findings to contribute to media dialogue

*Research*

* More applied research with partners
* Use HERO infrastructure to leverage strengths across multi-disciplinary stakeholder members to conduct applied research.
* There are 323 Million people in the US and 116 Million of them are in the labor force. Address the business view that success means productivity. We need to change the psyche of business so they understand that the pie can be much larger than that.
* Program benefit (of investment) is more immediate and not just about end of life. Focus on “feeling” and “functionality” benefits.
* Need to distill research papers into plain English for employers.
* Use the tools we have like the HERO Scorecard to track gaps and make resources on how to address the gaps more accessible
* What does success look like at HERO? How do we know when we have succeeded? Need to measure against our mission.
* Look at HERO Scorecard data for year over year improvements. Are there any organizational outcomes associated with some of these practices?
* VOI: Need a framework for measuring VOI in a way that employers and business leaders understand
* Need research to focus on fundamental mission of HERO which is broader than wellness
* Like the big goal of 100 MHL. Can HERO have a bigger strategic goal? Does HERO have a 5-year plan to reach specific goals? [Note: Follow-up on this to come at Forum]
* Research is needed in the health care space where wellness fits. Integrate with provider community.

*Deliverables*

* Get employer input on how to make materials more digestible and usable. Employers don’t have time to read everything. Make sure employer input is gathered at all stages.
* All deliverables should have Executive Summary
* Disseminate in the form of a slide library that is cross-tabbed with references
* Establish a member advisory/community network for questions on a deliverable
* Develop a library of guidebooks. Include a one-page synopsis of “the story” behind each research initiative.
* Develop a slide library for employers on HERO website with ability to ask questions of named Subject Matter Experts
* Develop a HERO seal of approval to help translate research into practice
* Need a resource area for employers around best practices. Can HERO collect information to share?

*Communications*

* Ensure timely communication and set timelines so resources can be coordinated across many organizations. Can’t run three year studies because corporate messages change 10 times during that timeframe.
* Use HERO messages to help organizations build employee trust and engagement.
* Help organizations understand how to position approaches (including environmental and culture initiatives) as business imperatives.
* Who are the right people to distill HERO research into terms that employers understand?
* Choose a key theme backed by research that people can use to advance their own agendas with key messages that stay true to the research.
* Need front line employee language. How do we test if our messages are relevant?
* Get content to the right people

*Voice of the Consumer*

* Net Promoter Score concept (would you recommend this to others?) – use this approach as a primary measure of the employee experience. We need new measures for consumer point of view.
* Address individual and the population levels; incorporate Net Promoter Score concept into Scorecard

*Training and Development*

* Turn learnings into training and development resources that speak to various organizational stakeholders.
* Provide an advisory service on particular needs, for example, how to adjust to a new population/culture as part of an acquisition.

*Member Engagement*

* There is untapped potential in HERO’s membership. Survey the members to identify areas of expertise, interest, and specialized skills
* Create a repository of “expert” volunteer services
* There are already resources in communities so build on the current work. Identify what is currently happening.
* Give HERO feedback after the meeting and identify what each member is willing to contribute. Need a mechanism to get member input.
* Need a mechanism for members to have permission to connect with one another for follow up.

**How to Address Well-being**

*HERO Strengths*

* HERO strengths are: employer focus, broad representation of members with expertise in research and analytics, neutrality, active members, and openness to participation without exclusive criteria or barriers.
* HERO is uniquely positioned in employer world but mostly larger employers, including for profit and non-profit. HERO has a history of relationship with RWJF and JOEM. Also promotes an integrated/holistic view of health and well-being.
* Metrics (already core competency), engagement (underway), communications (needs improvement)
* Employers are uniquely positioned and HERO is uniquely positioned. Scorecard looks at enablers within a concrete framework.
* HERO includes many sectors
* HERO uniquely leverages many relationships to promote policy, education, research

*Suggested Actions*

* Leverage members and thought leaders between not just companies or HERO, but all other national thought leadership organizations. Like a NATO for well-being.
* Conduct a consensus project on well-being
* Leverage existing HERO community, tools, and resources to address well-being.
* HERO could serve as a convener for the industry and bring other stakeholders to the table.
* Leverage the power of story (qualitative and quantitative) and take to policy makers. Use to shift the paradigm and advance best practices.
* Well-being paper that Tom Kottke published should be turned into plain English and disseminated.
* Harvard Business Review changed its metrics for top business from performance to add other business outcomes. Bezos (Amazon) went from #1 to #84 when they did this. It changed the conversation.
* How do you make well-being part of the mainstream media conversation?
* Help determine: Is well-being measurable? Some say others have defined it well enough and others say that well-being is not an outcome. Is it a metric like life satisfaction? Some say it’s subjective and about people’s perceptions and not an objective measure.
* HERO’s role should be an advocate for the well-being paradigm and shared value/triple bottom line (value proposition)
* Marketing opportunities are key. Package the research and beat the drums around well-being.
* Accelerate information on best practices. Distill and synthesize best practices.
* Address the divide between business and employees. What influences trust?
* Create an information repository
* Facilitate gathering information and promote collaboration
* Keep working with other networks like NBGH
* Partner but be inclusive, participatory
* Convene around well-being on an annual basis. Hold a summit with shared findings.
* Move from risk reduction to improving health, job, purpose, enjoying life
* Bring a progressive employer to HERO
* Better synthesize messages into brief bursts and not delay to get the full story or report out
* HERO can be an advocate for what we do. Speak in normative language. Talk about what well-being means.
* Develop concrete recommendations for research to be more relevant
* There is a business imperative to focus on well-being. How to tackle trust issues with educational content?
* Get commitments of 10 hours of volunteer time per year to help employers with a well-being initiative
* Collaborate with universities more for lifecycle approach to lifestyle behaviors. Research on family influences.
* Employers already have exemplary practices so develop case studies to shine light on innovative ideas.
* Increase the evidence base
* HERO needs increased perspective on employer needs and mindset
* Research across domains
* Move from who to how to what
* Well-being is a mindset for individuals. Can you be well and not have high physical health? What are examples of this?
* What is best practice in terms of addressing well-being?
* Make sure we do not lose sight of keeping physical health a part of well-being (caution)