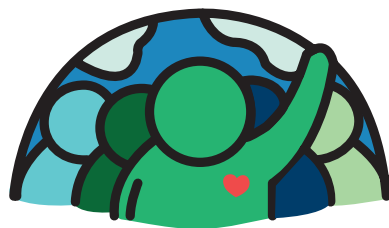# HERO FORUM23
PROCEEDINGS

HERO FORUM 2023

Doing Well by Doing Good:
How Responsible Organizations are
Addressing Societal Challenges
September 26-29, 2023 • Salt Lake City

WHAT'S INSIDE

Companies Doing Well by Doing Good

Karen Moseley,
President and CEO, Health Enhancement Research Organization

How organizations have responded to COVID-19 by putting the health and safety of their employees and customers ahead of other business priorities is a dramatic example of how companies can do better by caring for people. The great resignation is a prime example of natural selection with those companies that are creating environments where people could thrive being those *most likely* to retain talent. But it doesn't take a pandemic to appreciate the vital role business can play in improving the health of their employees and their communities. Salt Lake City, where HERO convened Forum23, is home to many followers of The Church of Jesus Christ of Latter-Day Saints (LDS), a faith community that is one of the most frequently researched populations when it comes to understanding the relationships between beliefs, lifestyles, and population health.

Pioneering LDS faith research has found that Mormons have a life expectancy ten years longer than the general population, due to their religious sanctions against smoking and alcohol use as well as their fasting practices and their faith-based social supports. And just as we've long understood that institutions can advance health, there is also a litany of research showing how organizations can *diminish* health. For example, sexual minorities, or those who experience the

stigma that comes with leaving their church, experience higher rates of depression and other mental health problems.

Forum23 built on these seminal community-based studies by examining "How Responsible Organizations are Addressing Societal Challenges." There is nothing new about asking whether the purpose of business should include improving society. Dr. Jack Groppel teaches his Judson University business students about how business began: as trade, without the trade of currency but the expertise of one helping the needs of another. The Golden Rule: Do unto others as you would have them do unto you. We think questions about the role the employee health and well-being movement can play in meeting today's challenges related to social justice, diversity, and global warming are questions that are ripe for exploration.

The ESG movement is a recent iteration of Corporate Social Responsibility departments and follows on principles of Conscious Capitalism and B Corps as a means of assessing a company's do-gooder status. ESG factors, the environmental, social, and governance issues companies can affect, are highly regulated in Europe, but so far the United States Securities Exchange Commission (SEC) has taken a light touch. Until recently, ESG factors were primarily used by investors to guide their decisions, but lately other stakeholders, including workers, customers, and regulators, are also taking interest in whether an organization's policies and practices align with their values and whether their commitments to consumers are real or merely whitewashing to burnish their reputations.

HERO research has long focused on the "S," the social factors in ESG, especially via our studies of the validity of the HERO Health and Well-Being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard). We consistently find that those with high scoring wellness programs have healthier employees and greater reductions in health care costs compared to low scoring companies.

ESG Investment Practices, as outlined by the SEC, cover a "wide variety of investments and strategies," such as:

- Environmental – conserving natural resources, reducing waste and pollution, and adopting renewable energy sources;
- Social – promoting diversity, equity, and inclusion; engaging in fair labor practices; and enhancing health and well-being; and
- Governance – providing transparency and accountability, diversifying boards, and ensuring that executive compensation is equitable.

HERO is always interested in ways to enlarge the ambitions and the influence of the workplace well-being movement, so with Forum23, we challenged attendees to consider their role in creating alignments between ESG measures and workforce well-being best practices. Could the convergence of the population health and ESG movements elicit new measures or inform new strategies in workplace well-being? Might ESG measurement standards come to supplement or even supplant other measurement tools like health and well-being scorecards, employee health risk appraisals, company satisfaction surveys, and/or medical claims data analysis?

As HERO Senior Fellow Paul Terry suggested in an editorial in the *American Journal of Health Promotion* earlier this year, we think the role of ESG Standards are still TBD, to be determined in America, but it feels like the right time to ask whether the lessons we've learned from validating measures, such as those we use in the HERO Scorecard, can inform the development, reporting, and improvement of ESG measures.

The SEC has proposed enhanced disclosure requirements for funds and advisors that claim they are focused on ESG practices. In an investor bulletin published by the SEC, it is clear that ESG criteria are still in the formative stages. No specific standard measures have been issued, so each of the ESG categories are based on examples that a company *"might focus on."* The environmental component *may be* based on pollution metrics or energy use. The social component *could* be based on human rights, employee health and safety, or community investments. The governance component *could include* the composition of board members, shareholder rights, or ethics. Still, while the SEC isn't definitive about what ESG measures matter most, they are clear that overstating or exaggerating ESG claims, called "greenwashing," is something they will challenge.

The SEC also notes that ESG investing "may be referred to in many different ways, such as sustainable investing, socially responsible investing, and impact investing."

While the SEC is signaling flexibility and a light touch, detractors have characterized ESG investing as a strategy to advance liberal causes and block investments in select companies. A key purpose of a HERO Forum is to deepen our understanding and examine our differences, so we welcomed respectful and thoughtful debate about how ESG measures and health and well-being measures could be mutually reinforcing, as well as where such measures could create resistance or misunderstandings.

As a non-profit research and education organization, HERO is decidedly non-partisan. As with any topic we address, our interest in exploring the potential to integrate workplace health with ESG practices is primarily informed by evidence and empiricism. Do we take the employers' point of view and consider how ESG factors boost business success? That is, is HERO pro-business? Absolutely. And do we examine the employee's perspective and how ESG investment practices relate to employee engagement and satisfaction? That is, is HERO pro-employees and pro-labor? Yes, for sure we

are. And following on our learnings over the past decades from the use of the HERO Scorecard by thousands of companies, it seems a certainty that we will continue to find that the most successful companies share our view that boosting employee and community health is a sure way to boost business. To reduce such learnings and leanings to fuzzy jargon, to false choices between business and labor, or to ill-defined accusations of being partisan seems an over simplification at best.

Instead of getting distracted by political noise, we hope that the SEC, investment fund managers, financial advisors, and other ESG proponents will look at the evolutionary journey of the workplace well-being movement and learn how the "S" in ESG has been advanced via the use of corporate wellness best practices scorecards. Dr. Ron Goetzel, a leading expert in our field, led the study of the validity of the HERO Scorecard in predicting health care cost and health risk trends. He found that those with high scoring wellness programs had significant reductions in health care costs compared to low scoring companies.

Following on Goetzel's research, scorecards have been used to demonstrate the role of employee health promotion in boosting shareholder value. HERO researchers, for example, found significantly higher six-year stock performance values for companies with high scores on the HERO Scorecard compared to the S&P 500 Index of like companies during that period. Another study led by Dr. Goetzel demonstrated similar results for 26 companies that won the C. Everett Koop Health Award for their wellness programs. Such are the kinds of data that ESG advocates are probably not aware of, but they should be!

Contrasting views on the role companies can play in addressing health issues are nothing new. Many will always cast the role of companies as that of growing capital and returning shareholder value. Profit maximizers may hold that the challenge of solving social ills is best left to churches, politicians, and the public sector. The ESG movement, in contrast, holds that returning value to shareholders, employees, customers, and the communities they serve is a way to do

business that is better aligned with what all of these stakeholders say they value: a company that cares about people and the planet as much as profits.

In 2019, the Business Roundtable sought to "promote an economy that serves all Americans" and released a statement that redefined the purpose of a corporation. Today's corporation should not only be accountable to shareholders but also should have a "fundamental commitment to all of our stakeholders." This acknowledgement of the primacy of stakeholder values included investing in employees' training and education; fostering diversity, equity, and inclusion; supporting communities; protecting the environment; and treating suppliers fairly and ethically. The statement was signed by 181 CEOs who made this commitment to "lead their companies for the benefit of all stakeholders." Skeptics have noted that these signatories represent a miniscule fraction of corporate America. Nevertheless, many of the companies

they lead are coveted brands that have an indisputable record of understanding what consumers want.

Today's younger workers, in particular, report that they aspire to work for companies that are altruistic, community-spirited, purpose-driven, and responsible stewards of the environment. Perhaps it is the influence of this next generation of health promotion leaders that is being exerted as we have seen a steady shift from a focus on strategies that support individual behavior change to a greater focus on changing systems and environments. The social factors that influence well-being, such as those captured in studies of Mormon communities, were foremost driven by a culture that shaped beliefs and health behaviors.

Upon arriving in Salt Lake City after four months and 1000 miles, Brigham Young looked down into this valley and declared "this is the right place" for them to find peace and safety. So, really, what better place for a HERO Forum intent on making peace with, even reconciling, the many questions still unanswered about how companies can do well by doing good.

Karen H. Moseley

HERO Forum23 Program Director: David Ballard, PsyD, MBA

❯ HERO EDUCATION COMMITTEE MEMBERS:

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Ryan Sledge, MPH, MBA, HCA Healthcare
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Lisa Spinks, Segal
Amy Upp, MHP, DHP, OhioHealth
Emily Wolfe, MSW, LCSW, HERO

HERO 2023 Healthcare Summit

The HERO Healthcare Summit convenes annually, immediately before the HERO Forum, with healthcare leaders to address issues unique to the healthcare workforce. Participants learn from peers and subject matter experts while sharing their experiences in engaging collaborative sessions. Each year, emphasis is placed on exploring tangible, real-world solutions to the healthcare industry's unique challenges.

Highlights

The Healthcare Summit Highlights represented here offer some examples shared by our speakers throughout the meeting. For more specific details and speaker attributions, you can purchase the full recording here.

Changing the Way We Work: Well-Being in Healthcare Workplaces, Policies, and Practices

Bryan Bohman, MD, Associate CMO, Workforce Health and Wellness; Senior Advisor, WellMD Center; Clinical Professor of Medicine and of Anesthesiology, Stanford Medicine Health Care

Bridgette McCullough, MPH, RD, Leadership Development Advisor, OhioHealth

Emily Stirling, MBA, MRC, CRC, Social Wellbeing Director, Intermountain Healthcare

Suzy Harrington, DNP, RN, MCHES, Health and Well-Being Executive

Jen Wright, MPH, Director Workforce Experience, SC Hospital Association

The circumstances of the last several years have exacerbated ongoing challenges of stress, fatigue, burnout, and mental strain among healthcare workers, leading to significant turnover and decreased employee engagement. There is an overdue need to innovate and change how we work by addressing the environments, policies, programs, and practices we use to support the healthcare workforce's well-being. During this year's Healthcare Summit, we connected the dots between healthcare organizations' employee health and well-being obstacles with potential system-level solutions.

Building Healthcare Professional Wellness at Multiple Levels
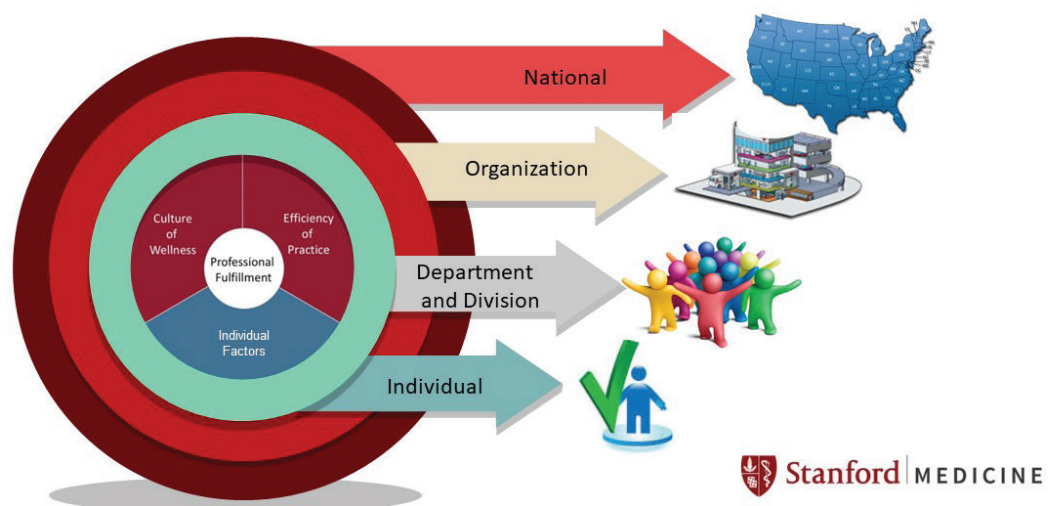
Three Interrelated Domains Encompass Multiple Drivers

Leadership Competencies
Fair and Just Culture
Culture of Compassion
Values Alignment & Moral Injury
Diversity & Inclusion
Voice/Input
Meaning in Work
Community/Collegiality
Appreciation & Support

Culture of Wellness

Efficiency of Practice

Occupational Well-Being

Individual Factors

Process Optimization (efficient, orderly, reliable)
Team-Based Care
Staffing, Turnover
EHR Usability, Support
Documentation Requirements
Scheduling: Efficiency and Control

Self-Care (sleep, exercise, nutrition)
Self-Compassion
Work-life Integration (prioritize relationships)
Meaning in Work
Social-Emotional Support

Bohman et al, NEJM Catalyst 2016

Stanford MEDICINE | WellMD

How can you **take action** to support the well-being of your employees through **leadership development**?

Small Organization or Limited Resources	Larger Organizations
+ Start with training focused on **emotional intelligence** and **empathy- building**	+ **Build a bridge** between your leadership development, wellness, DEIB and safety strategies
+ Ensure top leaders are **modeling the right behaviors**	+ Offer **safe-space leadership sessions** where leaders can share their challenges and ideas
+ Consider a **book, article or podcast club**	+ Evolve existing transactional leadership skills training with **human-centered** leader development offerings
+ Build a **virtual library** of public domain resources to support self-directed emotional intelligence development	+ Collect and share team well-being data in a dashboard for managers, and make it a **core competency** in leaders' performance reviews
+ Use **360 feedback** to allow teams to provide feedback on leader behaviors – awareness is key!	+ Consider training and/or coaching for **ALL** – don't wait until someone is promoted to a leadership role to get started

OhioHealth

The **Cascade of Impact**
A matter of Corporate Social Responsibility

Parents

Parents who experienced more **job autonomy** and a more **supportive supervisor** were

✓ **warmer** and **more engaged** when interacting with their infants

Children

Children of these employees had:
✓ **better reading & math skills**
✓ **better social skills**, and
✓ **fewer behavioral problems** in the first grade.

Partner/Spouse

The supportiveness of your **partner's boss** positively effects how likely you are to thrive at work

OhioHealth

Perry-Jenkins, Maureen. How Parent's Experience at Work Impacts Their Kids, Harvard Business Review 2023
Westring, Alyssa. The Ripple Effect of a Bad Boss on Dual-Career Parent, Harvard Business Review 2023
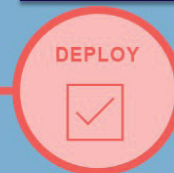
Empower Leaders

Setting Boundaries

Take Back Your PTO

Leader Rounding Guide

Leader Guide to Team Culture of Well-being

Leader Guide for Creating Your Team's Culture of Well-being

RESEARCH   STRATEGIZE   DEPLOY

Intermountain Health

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3 Types of Peer Support

Informal Peer Support	Peer Support by Leaders	Formal Peer Support
• Know your team • Know your resources	• Know your team • Model Behaviors • Check-ins & Rounding • Difficult Conversations • Who supports you?	• Safety event • Malpractice • Workplace violence • Difficult conversations • Personal stress

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What can organizations do?

Addressing Health Worker Burnout
The U.S. Surgeon General's Advisory on Building a Thriving Health Workforce
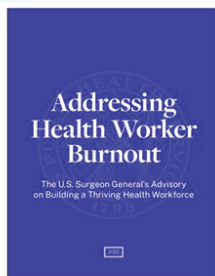
- Transform workplace culture to *empower health workers* and be responsive to their voices and needs.
- Show health workers how much they are *valued*.
- Build a commitment to the *health and safety of health workers* into the fabric of health organizations.
- Review and revise policies to ensure health workers are *not deterred from seeking appropriate care* for their physical health, mental health and/or substance use challenges.
- Increase access to *high-quality, confidential mental health and substance use* care for all health workers.
- Develop *mental health support services* tailored to the needs of health workers.
- Rebuild *community and social connection* among health workers to mitigate burnout and feelings of loneliness and isolation.
- Help health workers *prioritize quality time* with patients and colleagues.
- Combat *bias, racism, and discrimination* in the workplace.
- Work with health workers and communities to confront *health misinformation*.
- Invest in health prevention and social services to address *health inequities*.

https://www.hhs.gov/sites/default/files/health-worker-wellbeing-advisory.pdf

Addressing unique needs of health care professionals

Getting Rid of Stupid Stuff (GROSS)

- **Improving efficiency of practice environment**
  - Reducing EHR documentation times
  - Improving operating and cross coverage
- **Improving elements of organizational culture**
  - creating collegiality and community between health care professionals
  - advancing leadership behavior among clinical and section leaders
  - creating peer support and other support resources for those in distress

https://www.hhs.gov/sites/default/files/health-worker-wellbeing-advisory.pdf

2020 Care Team Wellbeing Survey
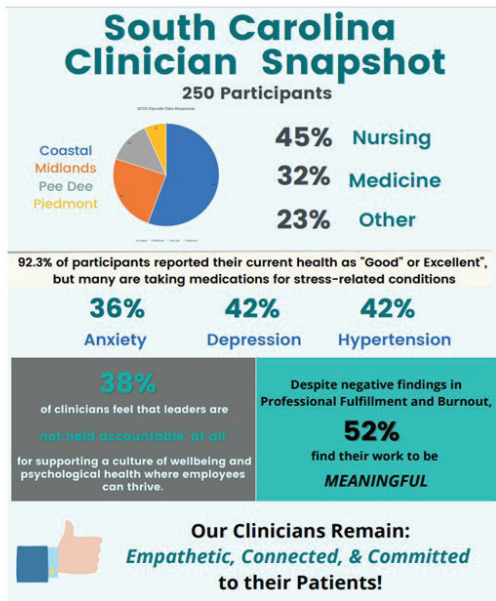
In the 2023 HERO Healthcare Summit, healthcare leaders were encouraged to apply systems thinking to the challenges of high turnover and low engagement caused by healthcare worker stress, fatigue, burnout, and mental strain. Attendees were reminded that clinician and care-team well-being is a critical component of the quadruple aim and the need for workplace health and well-being professionals to take radical responsibility to convince senior leadership to implement system-level solutions. The half-day summit concluded with an interactive multi-media learning session, hearing directly from the voice of the Staff, healthcare workers, who shared their personal and professional experiences reflecting how these issues impact them and examples of practical and effective solutions.

Voices of the Staff

To ensure that the voices of the care team were represented as part of HERO's 2023 Healthcare Summit, we conducted a Voices of the Staff video interview. The pre-recorded interview was shared as part of the Summit, and content was leveraged for collective learning and roundtable discussion. You can view the complete recording here.

Interview questions:

- What is your *why* for doing this job? Why do you stay? Why do you think people in similar positions are leaving?
- Please share 2-3 examples of workplace policies or practices that create unnecessary burdens (thus negatively affect your well-being). Follow-Up Question: Can you think of a possible solution(s) for these?
- If you had a magic wand and could change one thing about your work environment (physical space, policy, procedure) to positively impact your well-being, what would it be?
- What are some of the best things your employer has done to support your (health & well-being) mental health needs?

HERO is considering additional learning opportunities to connect and support healthcare systems, thus allowing attendees to share research and best practices for tackling issues facing healthcare systems today. To share your ideas and be included in this work, please email HERO's Director of Learning Experience, Emily Wolfe: emily.wolfe@hero-health.org.

GENERAL SESSIONS

Thank you to our 2023 Forum Conference Chair, Dr. David Ballard.

HERO is always interested in ways to enlarge the ambitions and the influence of the workplace well-being movement, so with Forum23 we challenged attendees to consider their roles in creating alignments between ESG measures and workforce well-being best practices. HERO Forum Conference Chair David Ballard, PsyD, MBA curated an agenda overflowing with thought-provoking general sessions and engaging speakers that connected themes and interrupted current thinking.

Kicking off Forum23, HERO's President and CEO Karen Moseley sat down with opening session panelists to explore various stakeholder perspectives on the role of health and well-being in ESG and other sustainability frameworks. Nicole Alfonsin, MPH, International WELL Building Institute; Janis Davis-Street, MS, MA, EdD, CHES, Chevron; Melissa Tucker, MBA, RN, ASCM CEP, Aon; and Max Dulberger, MPA, Segal Marco Advisors shared standards body, employer, consultant, and financial investment views and set the stage for the Forum theme. The panel described the general approach, discussed various ESG frameworks, the current landscape of employer actions and future directions.

Many themes that emerged in the opening session echoed throughout Forum23 in various breakout sessions, lunchtime discussions and hallway conversations, culminating in a corresponding panel the closing day, where HERO Senior Fellow & Scientific Advisor for Workforce Mental Health David Ballard, PsyD, MBA sat down with Marleece Estella, MD, MHCM, bp; Lorna Friedman, MD, Mercer; and Mary Kay Gilhooly, MS, Adobe, to focus on the employer perspective. Panelists discussed how health is being integrated in the frameworks they use, how they set goals, measure progress and report results, and strategies for moving beyond static silos to connect and collaborate with internal and external stakeholders to improve health.

During the afternoon general session on Day One, a lively panel tackled the issue of keeping good science at the core of health promotion and wellness. Leslie Hammer, PhD, Oregon Health & Science University; Krystal Sexton, PhD, Shell; Bey-Ling Sha, PhD, APR, California State University, Fullerton; and David Ballard, PsyD, MBA, HERO, challenged attendees to look for red flags that may indicate bias or questionable validity in information, resources, and product and service offerings. Panelists discussed how we as an industry can strengthen efforts to translate research into practice in real-world settings, communicate it effectively, and equip practitioners to use it to inform their work and ended on a message about the importance of collaboration among scientists, practitioners, employers, and policymakers in order to have a real impact.

Day Two of Forum23 opened with a keynote from leading work-life researcher Tammy Allen, PhD, University of South Florida, on the opportunities and challenges of remote work arrangements when it comes to worker well-being. After reviewing the state of the science on what happens to employees when the physical boundary between work and nonwork disappears, how remote workers can effectively detach and recover from work and how remote work relates to health behaviors such as exercise and sleep, she was joined by Ryan Sledge, MBA, MPH, HCA Healthcare, to discuss practical implications for employers.

In keeping with a longstanding Forum tradition, Sara Johnson, PhD, HERO's Senior Research Fellow and Co-President & CEO of ProChange Behavior Solutions, Inc., gathered some of our profession's top researchers to discuss new and emerging studies that they consider most relevant and responsive to workforce well-being. Johnson, along with Laurie Whitsel, PhD, FAHA, American Heart Association and Kristi Jenkins, PhD, University of Michigan, covered recent research on topics including new weight loss drugs, nature prescriptions, the impact of food and diet on physical and mental health, employee stress and absenteeism by wage categories and implications for addressing social determinants of health, and efforts to make physical activity assessment, prescription and referral a standard of care in the U.S. healthcare system.

Before the ESG employer panel, the final day of Forum23 started with a panel on a modern approach to health literacy chaired by Seth Serxner, PhD, MPH, Serxner LLC with Karen Mueller, Horan Health, and Mel Goodrich, Sentara Health, offering their perspectives on how health literacy can be foundational to better health, better business and serving the greater good. Like last year, Kerry Evers, PhD, HERO Education Committee Chair and Co-President and CEO, ProChange Behavior Solutions, Inc. adeptly closed out the conference with key takeaways.

As always, Forum23 combined top-quality educational content with opportunities for professional networking and connecting with friends and colleagues — made all the better by games, refreshments and fun in the Skylight Ballroom with its retractable roof that brought us all a little closer to each other and to the fresh Salt Lake City air.

Mind the Gap: Putting Science to Work in Health Promotion

> **Leslie Hammer, PhD,** Co-Director, Oregon Healthy Workforce Center, Oregon Health & Science University

Krystal Sexton, PhD, Global Health Analytics Manager, Shell

Bey-Ling Sha, PhD, APR, Dean, College of Communications, California State University, Fullerton

David Ballard, PsyD, MBA, Senior Fellow and Scientific Advisor for Workforce Mental Health, HERO

The success of workplace health promotion efforts requires effective implementation of practices that are based on good science. To improve the protection of workers' health, the promotion of their well-being, and the provision of access to high-quality resources and services, we need to strengthen efforts to translate research into practice in real-world settings, communicate it effectively to employers, and equip practitioners to use it to inform their work. During the session, speakers challenged attendees to look for red flags that may indicate bias or questionable validity in information, resources, and product and service offerings.

Questions to Minimize Biases

Bias	What Do We Want to Know
Self-Interested Bias	Who benefits from the recommended solution? Is there any reason to believe the recommended solution will be more beneficial to the recommender than the organization?
Affect Heuristic	Is there any reason to believe the benefits of the recommended solution are being exaggerated or that the costs of alternative solutions are being exaggerated? Is there any reason to suspect that strong emotions or opinions by the recommender is biasing the recommendation?
Groupthink	Are there dissenting opinions about what might be the best solution to the problem? If the answer is no, why not (after all, most complex problems have multiple possible solutions)?
Saliency Bias	Is there reason to believe the recommended solution relies on analogies, examples, and parallels that may not generalize to the current situation?
Confirmation Bias	Are credible alternative solutions presented and are they presented fairly and accurately?
Availability Bias	Is there other information that would be of value and can we relatively easily obtain said information? If not, do we have enough information on which to base our solution now?
Anchoring Bias	Is data supporting the solution valid and accurate or is it possible the data may be biased? Is supplemental data available from other sources that would support the data presented?
Halo Effect	Is the group glossing over downsides of its solution because it is overly enamored with it? Are all key elements of the solution fully vetted?
Sunk-Cost Fallacy	Is the solution overly biased by past decisions and outcomes? Is the solution overly invested in the status quo because of prior successes and/or costs?
Optimistic Bias	Are forecasts for the solution overly optimistic? Are there relevant pieces of data missing that could adjust that optimism downward?
Disaster Neglect	Is the worst case scenario bad enough or has the team been too lenient in its assessment of the worst case?
Loss Aversion	Is the solution overly cautious so as to minimize potential loss? Does the group assume the worst case and present a solution that is too safe?

Source: Grawitch & Ballard (2019); Adapted from: Kahneman et al. (2011)

Think Critically and Look for Red Flags

- Source
  - Lack of expert credentials
  - Poor, questionable, or unproven reputation
  - Conflict of interest
  - Hidden agenda/ulterior motives
  - Selling the solution

- Claims
  - Too good to be true, extraordinary or exaggerated claims
  - Quick, easy, secret, or guaranteed solutions to complex issues
  - Cure all/fix all
  - Proprietary/closed system that prevents scrutiny or criticism
  - Inconsistent with generally accepted scientific views
  - Illogical
  - Original sources not cited or inaccurately translated
  - Confuses correlation with causation
  - Fails to consider alternate explanations
  - Not testable   Source: Ballard (2019)

- Evidence
  - Anecdotal or testimonial based
  - Insufficient supporting data – poor quality, gaps, cherry picking
  - Lack of published, peer-reviewed research
  - Small and/or unrepresentative samples
  - Unvalidated measures
  - Poor research design, not replicable, or hasn't been replicated

- Communication
  - Sensationalized headlines and overgeneralized conclusions/recommendations
  - Marketing gimmicks
  - Alarmism and use of emotion
  - Vague or absolute language
  - Pseudoscientific language or scientific terms used incorrectly
  - Appeal to common sense, authority, or ancient wisdom

                                                       Source: Ballard (2019)

References

1. Ballard, D. W. (2019, April). Putting Science Back Into Practice: Balancing Rigor and Reality in the Future of Health Promotion. Presentation at the Art and Science of Health Promotion Conference, Hilton Head Island, SC.
2. Grawitch, M. J. & Ballard, D. W. (2019). Pseudoscience won't create a psychologically healthy workplace. In Burke, R., J. & Richardsen, A. M. (Eds.). Creating Psychologically Healthy Workplaces (pp. 42-64). Cheltenham, UK: Edward Elgar Publishing.
3. Kahneman, D., Lovallo, D., & Sibony, O. (2011). Before you make that big decision... Harvard Business Review, 89(6), 50-60.

BREAKOUT SESSIONS

ESG + Health: Advancing Health Equity and Mental Well-Being in the Workplace

> **Emily Wolfe, MSW, LCSW,** Director of Learning Experience, Health Enhancement Research Organization

Lizzie Schoon, MPA, Senior Benefits Analyst, City and County of Denver

Heidi Greenberger, PhD, MPH, Vice President, Clinical Research, AbleTo

This session explored the natural intersections of Environmental Social Governance (ESG) with population health and workforce well-being. In more detail, the speakers discussed the role of business in advancing health equity and mental health in the workforce. The objectives were that participants would leave the session being able to:

1. Describe at least three opportunities for health and well-being industry professionals to inform the ESG model.
2. Identify specific actions businesses could take to advance health equity through diversity equity inclusion (DEI) informed policies and practices.
3. Summarize current workforce mental health and well-being best practices and identify trusted guidance and resources.

ESG models are an approach to evaluating organizations and their efforts to achieve goals in three main pillars: environmental impact, human and social capital, and corporate standards and governance transparency. This framework and associated standards assess an organization's business practices and performance across these pillars while also providing a means of measuring business risks and opportunities. Investors and asset managers often use ESG disclosures in their capital allocation and investment decision-making processes. There are many standards and reporting frameworks for evaluating specific ESG efforts. During this session, we specifically focused on the United Nations' Sustainable Development Goals (SDGs), the SDG Action Manager, the Global Reporting Initiative (GRI), and

the Sustainability Accounting Standards Board (SASB), noting areas of alignment with workforce and population health and well-being.

In terms of human and social capital, historically, many of the SASB and GRI disclosure standards were designed around a more conventional understanding of occupational health and safety management, injury prevention, and labor rights and ethics. Efforts have been made to apply a more holistic view of workforce and population health within common reporting standards through various revisions, and including the report, "Linking the GRI Standards and the Culture of Health for Business (COH4B) Framework." Still, population health professionals have an opportunity to inform and become familiar with ESG-related standards and reporting tools, identifying specific health-related topics and practices that impact our environment, communities, and workforce. Some examples of ESG pillars relating to workforce health and well-being include green building design; excessive heat and outdoor workers; recycling and waste management; workforce mental health; supply chain ethics labor laws; governance transparency health and safety; workplace health equity and diversity, equity, and inclusion application in all areas of business practice and policies.

In 2022, the HERO Healthy Workplaces and Healthy Communities committee created the Advancing Workforce Health Equity report. The report identified five policy areas with the most opportunity to impact employee health equity (see graphic). Addressing the needs of every individual in an organization can feel overwhelming. Using

these five policy areas and your own data can help narrow down a focus to create the most growth.
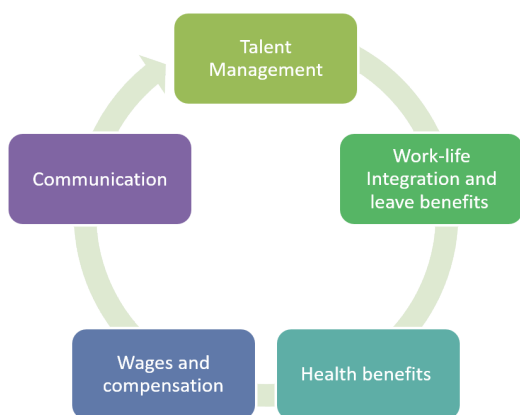
The City and County of Denver used its data to map where staff live and partnered with its internal GIS department's social determinants of health data to tell a story about their employees and their experiences outside of work. There are distinct neighborhoods in Denver where there are obvious disparities including food deserts, lack of access to health clinics, lower education, income levels, and even tree canopy. Of the city's employee population, 25% live in that area. The data also showed that one of Denver's two health insurance providers did not have any clinics in these same neighborhoods.

After examining wellness incentive program participation data, the city saw further disparities. Those who were least likely to participate and earn a $600 HSA deposit, were the lowest income staff who worked in the field. Mapping employees and examining their participation data led Denver to change the requirements of the wellness incentive program. This year, they provided onsite screenings to staff who live in areas where there were fewer clinics and more low-income staff. In the first six months after making the changes, 57% of those who earned the incentive through the new option had not earned it in the past year.

The COVID 19 pandemic brought other inequities between office workers and essential field staff to light. The field worker population was also less likely to use digital resources for health and well-being, including mental health resources. In response to this, the city has brought on two onsite counselors as well as an onsite nurse to build relationships with their field staff and help them access mental health and other health resources.

The speakers concluded the breakout session with a discussion about the commonalities and synergies among workforce mental health and well-being best practices and the pillars of ESG. The discussion was grounded in the prior work of HERO's Workforce Mental Health and Well-Being Committee. This committee has published a white paper that summarizes their systematic research and lists 6 evidence-informed workplace mental health and well-being best practices:

1. Leadership demonstrating support and care shows the organization's commitment to the importance of employee mental health and well-being.
2. Identification of psychosocial hazards in the workplace is an important step to identify opportunities to improve employee mental health and well-being.
3. Ongoing review and evaluation of mental health and well-being initiatives at all levels of the organization ensures resources remain relevant and effective.
4. Providing and promoting access to high quality behavioral health care, including through remotely delivered evidence-based pathways, ensures that employees have access to their preferred type of care when they need it.
5. Integrating these services into a comprehensive wellness strategy may concurrently promote improved total health outcomes.
6. Community partnerships extend the reach and resources of organizations and provide new opportunities to collaborate and be part of the solution.

In 2023, the committee brought these best practices to life with a set of video interviews of workplace leaders, highlighting their real-world implementation of best practice examples. Two video vignettes were previewed during the session: One described how a large international organization was implementing measurement into their mental health and well-being strategy; another described how a city-based organization was easing equitable and affordable access to

high quality mental health care through on-site and telehealth options. A video with key highlights and best practice clips from the full interview series is available on HERO's YouTube channel. Individual employer interviews are accessible in the members-only HERO Hub.

Session participants shared ways that their mental health and well-being initiatives go hand in hand with the tenets of ESG. One example linked the Social pillar of ESG to mental health and well-being best practices, including 1) **clear communication** about mental health benefits and leadership training, 2) recognition that **financial stability and job security** may contribute to mental health and well-being, 3) understanding the value of **measuring** how mental health needs may vary across employee segments, 4) ensuring that **high quality mental health care is** accessible and affordable, and 5) **equitable opportunity / ease to participate in mental health care** for diverse workforce segments.

Integrating the ESG framework and health equity into practical policies in the workplace can feel somewhat overwhelming. But, with a better understanding of the tenets of ESG, organizations can look at their baseline data to get a clearer picture of how to address mental health and health equity through an ESG lens.

A list of guidance resources and citations that informed this breakout session, as well as this proceedings summary, is accessible in the presentation deck.

Incorporating Well-Being into ESG for Business Impact: A Design Thinking, Interactive Session

> **Melissa Tucker, MBA, RN, ACSM CEP,** Senior Vice President, Health Transformation, Aon
>
> **Kim Kivimaki, MHA,** Director, Colleague Wellbeing, Aon

As talent, skills, and technology needs accelerate the necessity for workforce resilience, Aon's 2022-2023 Global Wellbeing Survey revealed that employers are focused on well-being now more than ever. Eighty percent said well-being is fully or slightly integrated into their overall business and talent strategy. In addition, forty-three percent of organizations have increased their investment in well-being. Aon explored the role of well-being in environmental, social, and governance (ESG) initiatives.

Because ESG efforts take place at a population, corporation, or even a global level, individuals may feel disconnected or receive little direct impact from these strategies. Forty-nine percent of organizations across the globe comprehensively or moderately incorporate well-being into ESG models. Globally, the ESG principle most impacted and influenced by well-being is social.

At Aon, they model to their clients how to incorporate well-being into ESG metrics for business impact. From an environmental perspective, Aon is committed to achieving net-zero carbon emissions by 2030. In 2022, their emissions were 453,520 tons of CO_2 equivalent (CO_2e), a reduction of 4% from 2021 and 16% from their 2019 baseline. Aon continues to reduce their total footprint through key drivers of travel, commuting, real estate, investments, and supply chain. Many of these reductions are made possible by Aon Business Services, a centralized organization within Aon. All spend and operations go through this organization. Aon has implemented "Smart Working," where colleagues work in-office, remotely, or both — wherever they're most effective, which improves engagement and well-being and reduces travel and commuting. With the flexible, "Smart Working" strategy, Aon has found that these efficiencies not only reduce their carbon footprint but also improve employee well-being and client service.

Top Priorities For Companies by Region

|	North America	Latin America	Europe/UK	Asia Pacific	Africa-Middle East
1	Attracting or retaining talent	Employee wellbeing (i.e., employee's overall, physical, emotional, social, career, and financial health)	Attracting or retaining talent	Attracting or retaining talent	Employee wellbeing (i.e., employee's overall, physical, emotional, social, career, and financial health)
2	Employee wellbeing (i.e., employee's overall, physical, emotional, social, career, and financial health)	Attracting or retaining talent	Employee wellbeing (i.e., employee's overall, physical, emotional, social, career, and financial health)	Profits and financial margins (i.e., control costs and efficiencies)	Attracting or retaining talent
3	Innovation of product and/or services	Innovation of product and/or services	Profits and financial margins (i.e., control costs and efficiencies)	Employee wellbeing (i.e., employee's overall, physical, emotional, social, career, and financial health)	Diversity, Equity, and Inclusion (DE&I)
4	Diversity, Equity, and Inclusion (DE&I)	Profits and financial margins (i.e., control costs and efficiencies)	Innovation of product and/or services	Innovation of product and/or services	Profits and financial margins (i.e., control costs and efficiencies)
5	Profits and financial margins (i.e., control costs and efficiencies)	Diversity, Equity, and Inclusion (DE&I)	Environment, Social, and Governance (ESG)	Environment, Social, and Governance (ESG)	Environment, Social, and Governance (ESG)

G8. Of the following list, which would you say are the top five **priorities** for your company? (Select up to five)

Source: Aon's 2022-2023 Global Wellbeing Survey

15

From a social perspective, their colleagues are at the heart of everything they do. The Aon United strategy is designed to attract, retain, develop, reward, and support their people. Inclusion and diversity (I&D) remain an essential part of the culture, including with the Board, which has a dedicated I&D sub-committee. Aon continues to take steps to embed I&D principles and practices throughout the organization. They hold themselves accountable to this commitment with increased transparency on human-capital management strategy and outcomes, and the inclusion of I&D goals within their executive compensation structure. Aon aims to reflect their values and social commitments in their work with clients, business practices, community involvement, and philanthropic efforts.

Aon offers frequent colleague feedback and surveys to learn how they can improve their culture, environment, and resources. They have focused on resilience and hired a Chief Wellbeing Officer. Their well-being strategy includes two days off per year for colleague well-being, and they support multiple dimensions of well-being such as physical, mental, emotional, and financial. They are using a human sustainability index (HSI) as a new way to measure well-being, employee resilience, and individual and team performance sustainability through diagnostics, coaching, training, and strategy consultancy. They have also implemented learning and development days to emphasize the importance of ongoing education and training.

Aspects of ESG Most Impacted By Wellbeing
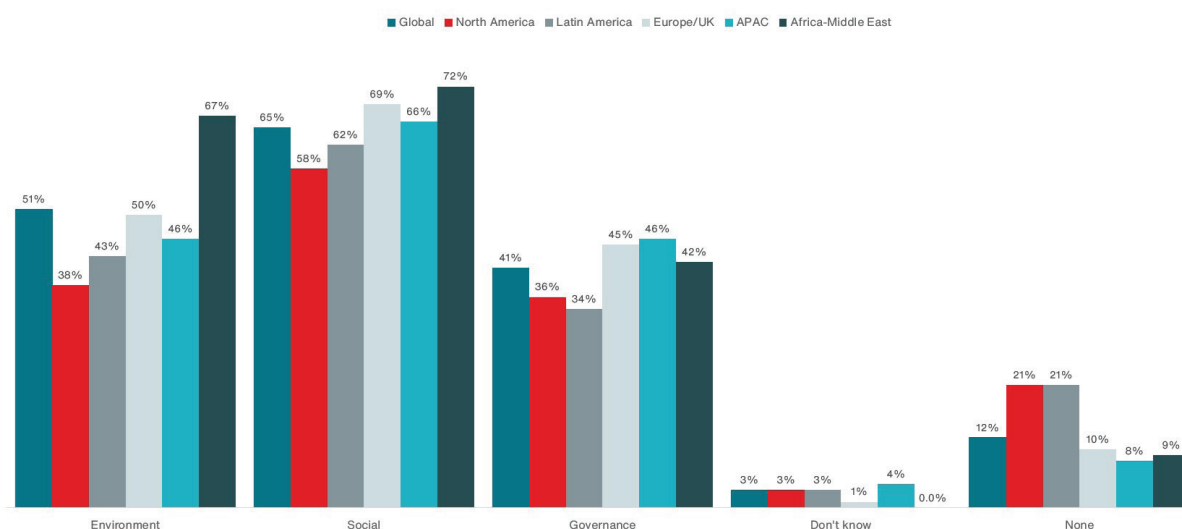
ESG2. Which aspects of ESG are most impacted and influenced by wellbeing? (select all that apply)

Aon has implemented social tactics for its own colleagues to help their people feel more valued and connected to their ESG focus. "United in Kindness" and "United in Gratitude," which asked colleagues to practice mindful appreciation with expressions, messages, and acknowledgements of thankfulness throughout the campaigns, were created to ultimately make gratitude and kindness an ongoing attitude within the culture of the organization. These social campaigns have had a positive impact and have won global awards.

From a governance viewpoint, Aon remains committed to the highest ethical and compliance standards. Aon designs their governance structures to inform business decisions and improve the way they serve clients efficiently and effectively. Aon's colleagues and leadership continue to work across the firm, with partnership from management led risk and product governance committees, to inform decision-making processes and build better solutions.

During the breakout session, Aon used design thinking in partnership with the breakout participants to create actionable solutions that focus on ESG + well-being. Design thinking encourages innovation. It is a non-linear, iterative process which seeks to understand users, challenge assumptions, redefine problems, and create novel solutions to prototype and test.

ESG Strategy Incorporates Wellbeing

	Global	North America	Latin America	Europe/UK	APAC	Africa-Middle East
Mostly incorporated (1-2)	49%	33%	44%	53% ⬆	53% ⬆	60% ⬆

Legend:
- ■ Comprehensively incorporates
- ■ Moderately incorporates
- ■ Slightly incorporates
- ■ Does not incorporate
- ■ Want to incorporate but not sure how
- ■ Do not have ESG strategy

Global: 19%, 31%, 23%, 9%, 9%, 10%
North America: 10%, 23%, 28%, 10%, 10%, 19% ⬆
Latin America: 21% ⬆, 24%, 21%, 10%, 12%, 13%
Europe/UK: 19% ⬆, 34% ⬆, 20%, 7%, 10%, 10%
APAC: 21% ⬆, 32%, 24%, 8%, 8%, 8%
Africa-Middle East: 19% ⬆, 40% ⬆, 19%, 9%, 12%

E1. Which statement best describes how wellbeing currently fits with your company's Environment, Social, and Governance (ESG) strategy? (Select one response)

Source: Aon's 2022-2023 Global Wellbeing Survey

References

1. 2022-2023 Aon Global Wellbeing Survey
2. Aon's 2022 ESG Impact Report

Fostering a Culture of Well-Being and Demonstrating the Benefits to Your Organization

→ **Andrea Neal, MA, CHES,** Senior Health Management Consultant, Marsh McLennan Agency

Michelle Hand, Senior Data Analyst, Marsh McLennan Agency

Sonya Finn, RN, CCM, Clinical Consultant, Marsh McLennan Agency

Zenia Moura, SHRM-CP, PHR, Compensation and Benefits Manager, Town of Apex

A growing number of small and midsize organizations want to support employee well-being but are challenged in 1) finding affordable ways to do so that are not a major administrative burden, and then 2) measuring the impacts of these efforts to justify their organization's continued investment. The Town of Apex, a small North Carolina municipality near the state's capital city, is an example of an organization that faced these challenges leveraged data to successfully design and deliver a wellness program, and then demonstrated positive impacts on their population's total health and well-being, as well as their organization's bottom line.

Strategy

Fostering a culture of health requires that an organization assess needs and opportunities across the multiple dimensions of well-being (physical, social, mental, and financial) and then deploy appropriate strategies and resources to support employees and their families. And like many organizations tasked with maintaining rich and attractive benefits while also being mindful of budgetary constraints, the Town chose to implement a wellness incentive program. The Town built the wellness program by tapping into local and carrier resources that address their top employee health and well-being areas of concern. This program encourages employees to be compliant with preventive care services recommended for them, and to complete a health assessment to better understand their personal health risks and how to manage them. Employees who complete these activities earn a medical premium differential. Supported by a network of Wellness Champions, the program is effective at engaging the majority of employees across the spectrum of health—not just the "worried well." Though the Town has many other strategies and programs in place to support total well-being, they wanted to measure the impact of this particular strategy.

Employee Well-Being
A strategic business decision

Providing a rich benefits package for our employees, which includes resources and incentives meant to support total health, allows us to:

• **Recruit and retain** top talent in an increasingly competitive work environment

• **Boost employee satisfaction** by fostering a culture supportive of their well-being

• **Improve the medical cost, risk, and utilization** trends of employees who engage with our wellness program

THE 4 DIMENSIONS OF

MMA *well-being*

FINANCIAL   SOCIAL   PHYSICAL   MENTAL

"

The more well-being resources an employer provides, the lower their average turnover.

–Beth Umland, Mercer's Director of Employer Research for Health and Benefits

"

The Town partnered with their employee health and benefits consultant, Marsh & McLennan Agency (MMA), to conduct this analysis. MMA's clinical consulting and data analytics team leveraged their data analytics platform that houses the Town's medical and pharmacy claims data to conduct a cohort analysis comparing employees who participated in the program vs. employees who did not, as well as a year-over-year analysis of employees who participated two years in a row.

Results

An evaluation of the program illustrates that participants have higher utilization of preventive care and telehealth services, lower ER visits and hospital admissions, and lower overall health risk and medical costs, despite having a higher rate of chronic conditions.

Though participants had a higher incidence of chronic conditions than non-participants, and similar claims utilization, they exhibited:
- 43% lower medical spend per member per month;
- Higher preventive care compliance rates for annual physicals, mammograms, and pap tests.

The 285 participants who participated two years in a row experienced:
- 18% lower medical spend per member per month, despite an increase in visits to the doctor and chronic condition prevalence;
- Improved preventive care compliance rates for annual physicals, mammograms, and pap tests.

Participant vs Non-Participant: Utilization and Cost

May '22> Apr '23 PAID

Medical + Rx Per Member Per Month
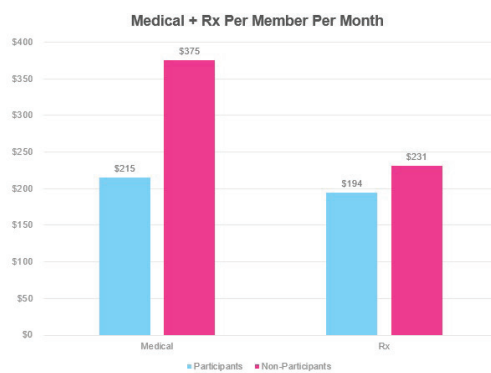
While there is only a 57 medical claim count difference between the two samples, the PMPM medical cost differs by $160.

Claims Utilization
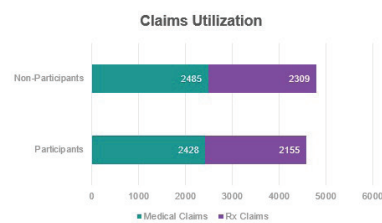
Participant vs Non-Participant: Preventive Compliance Rates

May '22> Apr '23 PAID

For most preventive measures, participants had a more successful compliance rate.

This ensures risky conditions are captured earlier, creating the opportunity for cost savings.

Compliance Rate

Conclusion

Designing a wellness program that leverages the right resources, incentives, and promotional strategies can create a well workforce and drive more favorable healthcare utilization.

The results of the evaluation are reinforcement that a well-designed wellness program attracts participants across the spectrum of health and positively impacts current and future health care risk, cost, and utilization trends. Put simply, engaging employees in their own well-being is not just the right thing to do, it's good business.

Improving Access and Reducing Barriers to Behavioral Health for a Dispersed Workforce: Lessons from the Minnesota Firefighter Initiative

> **George Esbensen,** President, Board of Directors, Minnesota Firefighter Initiative (MnFIRE)
> **Shannon Foulkes, MA,** Senior Client Executive, Optum
> **Steve Clausen,** Senior Vice President, Health Solutions Practice Leader, Aon

Former fire chiefs established the Minnesota Firefighter Initiative (MnFIRE) in 2016 to provide resources to more than 20,000 firefighters across Minnesota who were experiencing life-threatening health issues as part of their fire service. These prevalent issues included emotional trauma, cardiovascular disease, and cancer. Statistics show:

- 47% of firefighters have considered suicide and 16% went through with a suicide attempt.[1]
- Cardiovascular disease is a leading cause of line-of-duty deaths.[2]
- Firefighters have a 9% higher risk of being diagnosed with cancer and a 14% higher risk of dying from cancer than the general U.S. population.[3]

With emotional trauma, firefighters and other first responders have an elevated risk of mental health issues due to their work environment, personal stress, and the shame and stigma rooted in their professions, which associates a need for mental health counseling as being weak or unfit for duty. Additionally, 95% of firefighters dispersed across Minnesota are volunteer/part-time. Prior to MnFIRE, they did not have access to the behavioral health benefits traditionally reserved for full-time employees.

In 2021, MnFIRE and Aon approached Optum to provide emotional well-being services to these firefighters, and to build a curated network of behavioral health providers trained to understand the unique challenges of first responders. Soon after, the MnFIRE Assistance Program was established so that every Minnesota firefighter (including volunteer and part-time) and their families receive 5 free counseling visits per incident, per year.

Best Practices

During the HERO Forum23, MnFIRE, Optum, and Aon explained how organizations can use these best practices to create a comprehensive program to fit any organization and its members' unique needs. The 3 primary best practices include:

- Curating a network of counselors with experience with a dispersed workforce and their unique concerns and challenges;
- Promoting behavioral health services to members and their families; and
- Integrating a strong peer support program.

Curated Network

Providers in the MnFIRE curated network were required to have at least 2 of the following qualifications:

- Experience working with first responders;

Engaging a Dispersed Population

- Advanced post-traumatic stress disorder (PTSD), eye movement desensitization and reprocessing (EMDR) therapy, or trauma-informed care;
- Substance use disorder certified/licensed; and
- Background as a first responder.

They must also have knowledge of the hometowns in which the firefighters live and have appointment availability.

Peer Support Network Integration

MnFIRE created a peer support network that includes over 100 mentors. Firefighters are matched with a trained peer supporter who has "lived experience" with the difficulties these firefighters face. By providing emotional support outside of the traditional medical and behavioral health system, peer support directly reduces the culture of silence that has all too often resulted in worsening mental health and suicide in fire service. Peer supporters are voluntary and can be chief/command staff, active/retired firefighters, and/or spouse/family peers.

Member Engagement

The MnFIRE Assistance Program is diligent about promoting their program and communicating program benefits. They have created compelling videos and have received media attention on the local news across the state.

Because they don't use eligibility which means no home addresses (to honor confidentiality), the program employs creative ways to reach 20,000 firefighters across the state. Posters and brochures are mailed directly to every fire station, and there are almost daily posts on social media — LinkedIn, X (Twitter), and Facebook. Flashlights with MnFIRE Assistance Program information were handed out, stickers affixed on all conference bathroom mirrors at the most recent Firefighter Health Forum, and letters sent to community newspapers and city managers across Minnesota.

The Impact

Since its inception, the partnership has resulted in over 1,200 counseling visits with this specialized network of 916 counselors. Of those visits, 79% lived in small/rural areas, and 39% completed all five, free sessions, which means the information is disseminating across the state through the promotional channels, and members and their families are using the services.

Listening to understand the unique needs of the people MnFIRE serve helps them innovate to solve their challenges.

Making an Impact

Since the Hometown Heroes Act was passed in 2021, we've seen lives changed. As of July 2023:

- More than 16,000 firefighters have been trained on their occupational health risks.

- MnFIRE has fielded 662 Peer Support calls.

- There have been 1,332 visits to MnFIRE Assistance Program (MAP) providers for emotional trauma support.

- 141 critical illness claims have been paid (totaling $1,800,000+) to firefighters with a cardiac, emotional trauma, cancer or other critical illness diagnosis.

References

1 Behavioral Health Study Initially Shared By International Association Of Fire Fighters (IAFF)
2 National Fire Protection Association (NFPA)
3 The National Institute for Occupational Safety and Health (NIOSH)/CDC

What Can Business Learn from Higher Ed? Spiritual Well-Being for Diverse Workforces

Suzy Harrington, DNP, RN, MCHES, Health and Well-Being Executive
Megan Amaya, PhD, CHES, NBC-HWC, Associate Professor, The Ohio State University
Kelcey Stratton, PhD, Chief Behavioral Health Strategist, University of Michigan
Kristi Rahrig Jenkins, PhD, MPH, Research Program Manager, University of Michigan

Spirituality has long been a dimension in a holistic approach to well-being. A spiritually well person seeks harmony and balance by openly exploring the depth of human purpose, meaning, and connection through dialogue and self-reflection, and has clarified personal beliefs and purpose for life[1]. When people feel spiritually fulfilled, they are happier, more engaged, and more productive at work[2]. Traditionally, employers have been reluctant to address the topic for a variety of reasons; many organizations have steered away from religion and spirituality in the workplace on the basis that a person's spiritual practices may contribute to conflict between employees. Higher education organizations tend to lead the way when it comes to implementing evidence-based best practices in workplace and student well-being, including the incorporation of spiritual well-being.

This panel-style presentation explored the topic of spiritual well-being, providing two large academic institutions' experiences of implementing spiritual well-being as part of a holistic and comprehensive approach to well-being, and how resources and programs have been adapted to support a virtual and hybrid workforce. The goal was to identify evidence-based programs, services, and resources to support spiritual well-being for a diverse workforce and identify potential measurement and outcome variables that assess spiritual well-being needs and demonstrate program impact and value.

## Definitions and Approaches
The session began with an overview of spiritual well-being, including key concepts, definitions,

and approaches an organization needs to take when considering inclusion of this dimension. The Office of the U.S Surgeon General's Essentials for Workplace Mental Health & Wellbeing Model[3] encourages a mental/emotional and spiritual well-being alignment, with a focus on meaning, mattering, belonging, harmony, connection and community, and personal growth, all of which can be impacted by spiritual well-being efforts. Additionally, the Well-Being Complexity Framework was presented:

- **Why –** for thriving and purpose, "transcendence"
- **Who –** applicable to everyone
- **What –** one of well-being's dimensions or essential elements
- **How –** individual and cultural approach
- **When –** upstream and downstream support/ empowerment

The University of Michigan presented their eight dimensions of well-being model[4], and spiritual well-being programs and resources such as Nature Rx, Take 5 to Focus, and Recharge Rooms. The Ohio State University followed with their ten dimensions of wellness model[1], and spiritual well-being resources such as Health Athlete, Mindstrong, Interfaith, Reflection and Quiet Rooms, mindfulness programming and yoga classes, and educational programming. Many of these opportunities and services, except for services that require physical space, meet the needs of a hybrid workforce, as they can be conducted virtually or outside of work. Both institutions have employees who are not located on the main campus, including employees

and students who are located on regional campuses, satellite clinical offices, and extension offices. Programming and resources need to be as inclusive as possible for off-main campus individuals.
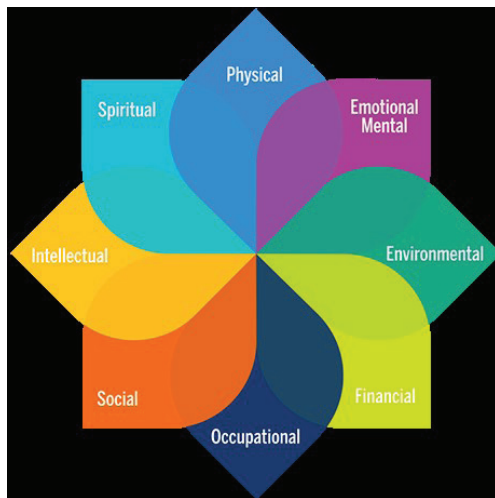
University of Michigan's Dimensions of Well-Being

The Ohio State University's Dimensions of Wellness

Outcomes and Measurement

There are a couple of essential items an organization needs to consider when determining the impact of spiritual well-being offerings:

- What are the goals? Metrics should link to the goals.
- What are you interested in measuring? Evaluation should examine program process, client/participant satisfaction, impact/outcomes, and lessons learned/quality improvement.

When it comes to measuring spirituality, there are several valid and reliable questions and tools to choose from. Single item measures of spirituality may include:

- "Would you describe your spirituality as...," with responses ranging from poor to excellent on a 5-point scale; or
- "How would you describe your overall spiritual well-being?" with responses on a scale from 0 (as bad as it can be) to 10 (as good as it can be).

Longer measurement tools include the Spirituality Subscale of the Mental, Physical and Spiritual Well-Being Scale[5], the Spiritual Well-Being Scale[6], and the Self-Transcendence Scale[7,8,9]. Organizations are advised to link program goals to the type of evaluation tool[5,6,7,8,9].

Spiritual well-being holds promise as a foundational element to overall well-being[10,11]. This session highlighted how and why spirituality should be incorporated into a comprehensive approach to health and well-being. The University of Michigan and The Ohio State University are leading examples for other organizations to consider as they develop an approach that best fits their workforce needs.

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Well-Being 3.0: How to Unify Wellness, DE&I, and ESG Efforts with Purpose

> **Written By: Hasira Soul Ashemu,** Adjunct Professor, University of Denver; Chief Visionary Officer, RRI Consulting

Co-Presenters: Eric Zimmerman, MBA, MPH, Chief Innovation Officer, Kumanu
Jeff Steir, Leader Purpose + Vision Practice, EY Americas, EY

A Revelatory Journey in DEI and Social Justice: Prioritizing Wellness

In 2019, I was diagnosed with stage 4 throat cancer for the second time within a span of four years. My first battle kicked off in 2015, a fight that involved surgical interventions like the removal of 14 lymph nodes and my tonsils. Now, 4 years later add to that an exhausting 39 rounds of radiation, shedding a staggering 28 pounds in a mere fortnight. This transpired in tandem with the world grappling with a pandemic, a collective pause if you will. It was a life-and-death intersection of personal and global crises that catapulted me into a profound realization: We've been approaching DEI and social justice entirely backward, and, unfortunately from not having a wellness lifestyle, I now had a life-threatening illness to prove it!

Now, let's keep it one-hundred here, a lion's share of DEI investments goes into DEI programs steeped in shaming, blaming, and guilting people into changing their biases and addressing systemic injustices. Not only is this strategy woefully ineffective, but it's also divisive and a veritable toxin to any organizational culture. For every stride we think we're making with this method, we're actually moonwalking and taking three steps back. We end up with a polarized workforce, wasted and/or drained resources, and negligible impact. And that's not even touching on the emotional and physical toll it can take, a toll I've felt personally.

The Self-Sabotage Quagmire in DEI

RRI Consulting's diagnosis of this DEI dilemma is simple but groundbreaking. Organizational actions and individual behaviors are often misaligned with our loftiest aspirations for inclusivity and fairness. It's the age-old trap of self-sabotage, manifested at both personal and organizational levels.

Neuroscience provides some juicy insights into this. Brains are hardwired to put survival over success. The amygdala, the emotional processing unit in the brain, initiates "fight or flight" responses when sensing threats. In corporate environments, these so-called threats might manifest as challenging projects, heated dialogues, or looming failures. Rather than confronting these challenges, the brain nudges us towards evasion, sparking a chain of self-destructive behaviors.

An innovative approach to DEI integrates behavioral sciences, psychological insights, **and** wellness lifestyle practices, taking cues from intellectual titans like Carl Jung. It's about peeling back the layers of our "shadow selves" — those suppressed traits and impulses that we've been conditioned to hide. When it comes to DEI, these racialized "shadows" coalesce with other unspoken fears, like ostracization and exclusion, derailing our initiatives before they even gain traction.

DEI's Missing Elixir: Wellness

It only makes sense; *unwell individuals do not have the psychological and emotional capacity to engage in the oft-times tedious self-development work of implicit-bias reprogramming.* In fact, it's unfair and unrealistic to expect those employees who are already burning the candle on both

ends without the necessary wellness support to then embark on a DEI journey. To invest in and build out DEI programs without coupling them with a robust wellness component is ultimately, and unfortunately, a recipe for failure. A failure that we can now see playing out in the wake of the billions of dollars invested in DEI after the George Floyd ordeal as reported by Forbes[1], The Philanthropy Digest[2], and the Financial Times[3]. Just consider the following evidence.

Annually, companies are losing:
- **$9.3B** on diversity trainings with little evidence of behavior change;
- **$400M** on employment discrimination lawsuits; and
- **50%** of potential revenue growth from lack of cross-cultural connections.

DEI isn't just about checkboxes; it's an avenue to navigate deeper issues around trust, empowerment, and interconnectedness, and in order to withstand the vicissitudes that are inherent in this type of journey you must have a foundational wellness lifestyle to bolster and support you. Period.

The pivot to this radical approach to DEI was buoyed by collaboration with Kumanu, a wellness trailblazer with their transformational platform, Purposeful. Their guiding principle says it all: "Wellness isn't a mere byproduct of DEI; it's the rock-solid foundation on which meaningful change is built." Employers can follow a Pathway to Purpose that begins with encouraging positive individual habits and behaviors among employees and builds from there to ensure wellness in employee relationships and organizational culture. Behavior change requires that we break things down into small steps and, as people master that, bring them along a journey for deeper actions. Employees are encouraged to start with "Mastering their Morning," which involves establishing daily habits with meditation, affirmations, morning nutrient infusion, exercise, and hot and cold infusions. When individuals are conscious of their energy and how they are starting their days, they gain the mindset, motivation, and grounding needed for healthy relating at work, including healthier relationships across race, class, and gender, and ultimately are more successful in their job functions.

So, there you have it. It's high time we turn the DEI narrative on its head, giving wellness the prominence it deserves. The results? A future where DEI initiatives aren't just mere corporate window dressing that simply scrape the surface but rather deeply rooted programming that at its core incorporates a wellness lifestyle that then triggers a seismic shift in our overall well-being. And that, my friends, is what revolutionary change looks like.

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The $50 Billion+ Employer Silent Crisis — Aging Workforce and Aging Population

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Data on the impact of caregiving in the workplace continues to show this issue is reaching a crisis point. Most of the conversation about working caregivers has been focused on caring for children. However, with an aging workforce and an aging population, there needs to be more education on the rising costs related to employees caring for aging adults. It brings a different set of challenges, but like caring for children, caring for adults impacts health benefits costs, productivity, and turnover rates. It also has a disproportionate impact on working women at all levels and employees from diverse backgrounds.

Caregivers for adults are not just those over 50 years of age. Recent AARP data[1] shows that employees as young as 18 may be caring for an adult; in fact, 47% of these working caregivers are 18 to 49. Currently, only about 20% of employers have any type of benefit or policy that directly addresses the time, money, and stress challenges for employees giving care to an adult special needs child, a spouse, a parent, or an aging loved one. The cost to U.S. employers this year is approximately $50 billion, and these costs will increase substantially over the next 5 to 10 years.

It's clear that, financially, many people will have to work into their 60s and 70s, and there is a strong likelihood they will have to manage care for a loved one. Additionally, there is the impact on younger employees caring for older adults because their parents waited to have children.

Making the Workplace Better for Caregivers
For employers, the first step is getting a baseline on what percentage of their workforce is either currently caring for an adult or expects to care for an adult in the next two years. It can be challenging to get accurate numbers because many caregivers will not identify due to the caregiving bias, negative beliefs employers have against employee caregivers. One way to historically measure the baseline and the impact caregiving has on the workforce is to look at the percentage of female employees who left the

Estimating Future Caregiving

Figure 6: Non-caregivers aged 45 years or older who expect to be caregivers within the next two years
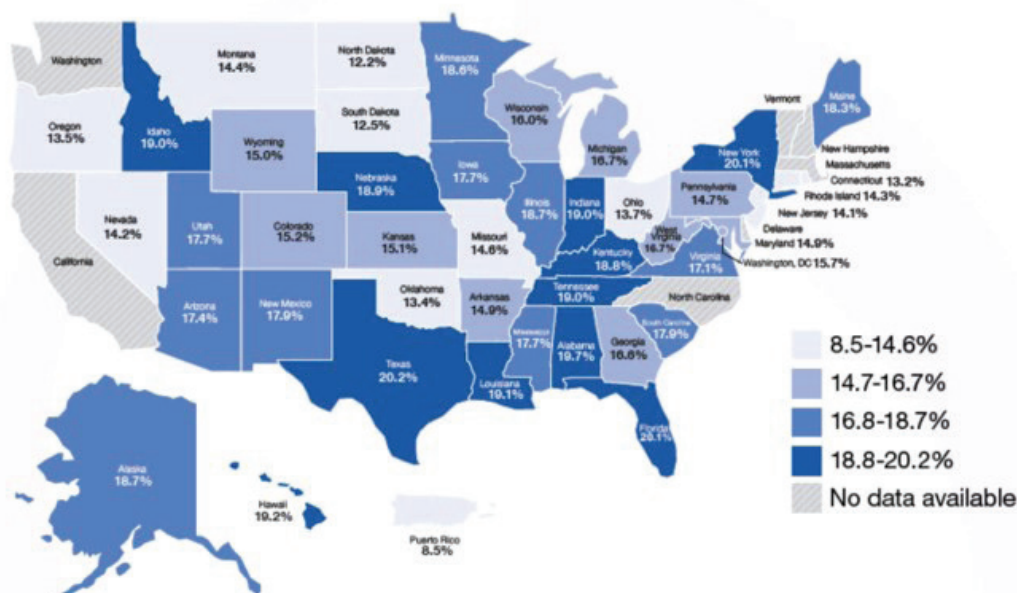
organization over the past three years. If they are over 45, there is a good chance that they left because of caregiving challenges. Another approach to find the number of caregivers in an organization is with a question in your annual employee survey that asks employees if they know anyone on their team or in the company who is currently caring for an aging adult.

From a financial wellness perspective, if a working caregiver is forced to choose between their job and their loved one, they are risking financial instability. They will not be able to save as much for retirement, may have no income while caregiving, and may forfeit opportunities to advance their careers. Post caregiving, it is extremely challenging for caregivers to get back into a position similar to the one they left. Often, automated HR systems will eliminate potential candidates because of the gap in employment due to caregiving, particularly for those over 50.

It's important to understand that caregiving management impacts productivity. Dealing with medical offices, hospitals, lawyers, Medicare, and service providers has to be done during working hours. In addition, caregiving employees don't have hours to spend vetting resources, nor do they have the expertise to evaluate how credible a resource may be. Other challenges include contracts, financial care plans, negotiating fees, andr understanding the types of insurance needed by a home care provider.
Finally, there is the emotional and mental health impact. Caregiving for someone with dementia or Alzheimer's or another chronic illness can be a long journey, sometimes taking more than a decade. This constant stress has an overall impact on the physical and mental health of caregiving employees, potentially increasing healthcare costs.

2023 AARP Findings[2]
- By 2034, adults 65 and older will outnumber children under the age of 18.
- In 2019, roughly 30 percent of family caregivers of older Americans lived in a household that also included children or grandchildren.
- Gen Z and Millennial caregivers are more likely than other caregivers to be working while performing their caregiving responsibilities.
- 61 percent of family caregivers work either full- or part-time.
- Diverse populations have distinct care needs and challenges

Employers need to take a proactive approach, so that an employee isn't overwhelmed when the unexpected happens. The solution can't just be about crisis management and needs to be more than just education. Every organization should be thinking about not only the policies, but also the benefits for employees that can reduce the time, cost, and stress of caregiving. These benefits should be integrated into a Total Rewards program so that related benefits like employee assistance programs and dependent care benefits are connected. Other examples of potential policies and practices include paid time off for caregiving, flexible work arrangements (e.g., telecommuting, job sharing, cross-training employees), and peer support groups.[2] The right benefits and policies, within a supportive environment, are required to address this growing challenge.

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HERO Forum23 is the First of Many Steps towards Doing Well by Doing Good

> **Presented by: Kerry Evers, PhD,** Co-President and CEO, ProChange Behavior Solutions, Inc
>
> **Summary by: Karen Moseley,** President and CEO, HERO

Forum23 provided an opportunity to explore the positive trends in the Environmental, Social, and Governance (ESG) movement, as well as highlighted some of the challenges. After a week of exploration, networking, and engaging discussions, this closing session reflected on key themes and shared experiences from the Forum including highlights from a variety of sessions.

Kerry Evers, who chaired the HERO Education Committee, opened this final session of Forum23 by commending Forum speakers for their topnotch sessions and posing three questions:

1. Will ESG and shared value frameworks actually move the needle?
2. Is doing good actually doing any good?
3. Is the ESG approach a sustainable movement that can help drive social change?

The presentation by **Emily Wolfe, MSW, LCSW,** HERO; **Lizzie Schoon, MPA,** City and County of Denver; and **Heidi Greenberger, PhD, MPH,** AbleTo was called out as providing one of the clearest representations for how well-being and health have potential synergy with ESG plans.

Linking Workforce Mental Health And Well-Being To ESG

Mental health and well-being best practices can be found in social, environmental, and governance ESG pillars

The table below is a simple thought exercise to illustrate some potential synergies between best practices and ESG concepts

ESG Pillars	Raise Awareness About Mental Health and Well-being	Manage Psychosocial Risks	Measure Population Needs and Intervention Impact	Provide and Promote Access to High Quality Mental Health Care	Integrate Mental Health Into Wellness Programs	Partner with Local and National Organizations
Environmental Biodiversity Carbon footprint Climate Greenhouse gasses Energy Waste reduction	Raise **awareness** of links between environment and mental health	Consider the links between **work location**, work **exposures**, and mental health risk	**Assess** the features of the work environment that can affect mental health	Does the **environment / work environments present barrier(s) to accessing high quality mental health care?**	**Environmental wellness initiatives** may promote mental health and well-being	**Align partnerships with organizations that** promote the health of the community / planet
Social Community Equal employment Equitable benefits Fair pay Labor law abiding Responsible partnerships	Clear communication about mental health benefits; leadership training	**Financial stability and job security** may contribute to mental health and well-being	**Measure** how mental health needs may vary **across employee segments**	Is the mental health care benefit of **high quality? Is it affordable?**	Diverse workforce segments have an **equitable opportunity / ease to participate in care**	**Volunteering in / contributing to the community** may contribute to mental health
Governance Avoid conflicts of interest Compliance Ethics Integrity Risk management Transparency	**Fair, ethical and transparent workplaces** may contribute to workforce mental health and well-being	Business practices/policies, **ethics, integrity** can impact mental health risk	Utilize **standardized, validated mental health metrics**	Equitable access to quality mental health care as **a corporate policy**	**Mental health needs/outcomes** are considered when developing wellness program offerings	**Leverage vetted evidence-informed mental health resources** curated by trusted organizations

Ten Takeaways from HERO Forum23

1 The track, **"Making it a Movement: Workplace Health and Well-Being as a Key Driver of the ESG Agenda,"** spotlighted the shift toward deeper and more holistic well-being practices and the potential for businesses to impact community health by focusing on ESG metrics related to health and well-being alongside other sustainability efforts.

> **"If you don't have a seat at the table, bring a folding chair."**
> – Janis Davis-Street, EdD, Chevron

2 The track, **"Critical Thinking and Evidence-Based Decision Making in Workplace Health and Well-Being,"** emphasized the role of managers and leaders in supporting mental health and the significance of creating environments that prioritize well-being and purpose and addressing health inequities and disparities. A collaborative approach to addressing complex workplace health and well-being (HWB) can be supported by evidence-based criteria for HWB vendor selection and the application of evidence-based codesign.

3 The track, **"Amplifying Efforts in Small- and Medium-Sized Enterprises,"** stressed the importance of data, diversity, and holistic approaches in amplifying well-being approaches. Employer examples provided insight into strategies for healthier, more inclusive and more financially secure workplaces that all organizations can apply.

4 The track, **"Measurement and Reporting for Accountable Action,"** called for actionable metrics and focused on the need for collaboration and integration of data, including data not traditionally used before now. Scientists need to collaborate with industry and address the paywall barrier in academic journals so that the literature is more accessible. Industry needs to stop hoarding data and collaborate across silos and fields on analyzing the wealth of data.

5 The track, **"Health Protection and Promotion in Hybrid, Remote, and Dispersed Work Environments,"** emphasized the importance of considering diverse employee needs, focusing on outcomes-based leadership, and creating equitable cultures to support both remote and in-person workers. Health and well-being can play a role in promoting diversity, equity, and inclusion and also improve satisfaction and retention. Use design thinking to create new benefit designs that are responsive to the needs of all employees. The #1 predictor of remote work productivity is space (e.g., ergonomic chair, large monitors, quiet space with a door); some companies are covering the cost with a stipend.

Remote and Hybrid Work

- Data show that remote work increases the amount and quality of sleep.
- Little data is available on the effects of remote work on productivity.
- Remote workers work longer hours.
- 1/3 of remote workers do not take breaks.
- 35% of hybrid workers would take a pay cut to be remote.

- 57% of workers would look for a new job if not offered flexibility.

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6 Work boundary management and social connection are growing issues. Right-to-disconnect policies and organizational "flex first" philosophies demonstrate leadership concern about too much connection and commitment to a culture of inclusion.

7 The pandemic has forced us to improve our communication skills. What you want people to hear is more important than what you say; we need less talking and more listening and more intentional talking.

8 There is a delicate balance between autonomy and accountability. Hire good people and trust them to do good work.

9 Caregiving is the leading contributor to gender inequality. Gallup estimates the cost of lost productivity due to absenteeism among full-time working caregivers is more than $50 billion annually in the U.S. On average, caregivers spend 23.7 hours/week providing care. Working caregivers have higher depression rates and worse physical health, as well as a bigger financial strain from the cost of caring. Implement supportive caregiving policies that also address financial well-being.

10 *Cura personalis:* care of the individual, why we're all here. "Treat employees like they make a difference, and they will!" – Jim Goodnight, SAS

Forum23 challenged all of us. To help meet these challenges, Evers ended by inviting Forum attendees to identify three things to increase impact in your workplace or your own personal well-being and reach out to someone you met and continue the discussion.

> **"Sometimes the best thing for our own well-being is to go outside and enjoy nature."**
> – Sara Johnson, PhD, Co-President & CEO, ProChange Behavior Solutions, Inc. / Senior Research Fellow, HERO

Join us next year to continue building the network and connections required to make this a movement!