

HERO ORGANIZATIONAL PROFILE

THE HEALTH ENHANCEMENT RESEARCH ORGANIZATION

(HERO) IS A NATIONAL NON-PROFIT THAT SERVES AS A LEADER IN THE CREATION OF WORKPLACE HEALTH & WELL-BEING RESEARCH, EDUCATION, POLICY, AND STRATEGY. HERO IS A NON-PROFIT 501(C)3 CORPORATION.



NETWORK | LEARN | ENGAGE

www.hero-health.org



National Leader in the Creation of Workplace Health & Well-Being (HWB) Research, Education, Policy and Strategy

Core Purpose

HERO was established to create and disseminate research, policy, leadership and strategy to advance the principles, science and practice of workplace health & well-being (HWB).

Our Value

Leadership: We convene thought leaders in workplace HWB and other organizations that have a stake in employee and community health and productivity.

Excellence: We are committed to advancing professional best practices that are based on research and documented outcomes.

Integrity: We adhere to strict ethical standards in how we interact with HERO members and other organizational leaders and in the way we partner with other organizations.

HERO Vision & Purpose

Vision: All workplaces will positively influence the health and well-being of employees, families and communities.

Purpose: Advancing health, well-being and performance through employer leadership.

HERO Think Tank Membership

Think Tank members have a hands-on role in the creation and dissemination of national workplace HWB policy, strategy and leadership. Membership in the Think Tank allows individuals and organizations to be at the epicenter of a dynamic evolutionary process that enhances the sophistication and credibility of the industry.

Think Tank members are part of a select leadership group that is continuously moving the health promotion profession toward new levels of quality and accountability. Think Tank membership is an opportunity for professional development that directly impacts knowledge and skills of HWB professionals.

Networking, Research, Education & Engagement

Member Organizations of HERO have the opportunity to benefit from:

- Membership in the HERO Think Tank and Think Tank Committees that provide leadership in moving the science of workplace HWB forward
- Opportunity to participate in the development and enhancement of important industry tools including the HERO Health & Well-Being (HWB) Best Practices Scorecard in collaboration with Mercer©
- Participation in groundbreaking research and educational opportunities, including presenting at the HERO Forum
- Presenting at and participating in our Wednesday Webinar series.
- Access to the HERO Resource Center with its collection of important presentations and white papers
- Give back to the field by serving as an expert resource and collaborator
- Engage in consensus development panels and publications that inform and influence public policy

Groundbreaking Research

Workplace HWB is now well-established as a prime factor distinguishing between good organizations and great ones. Where the growth of wellness occurred because the cost of health care has remained a major concern for corporate executives across the country, the maturation of workplace HWB comes with a keen interest in how to more deeply engage employees and what it takes to achieve a sustained culture of health and well-being. The HERO research agenda is focused on nothing less than answering questions about the future of work and the advancement of well-being in the face of extraordinary changes in technology, demographics, and generational needs and values.

2017 HERO Forum

September 12 - 14, 2017, AZ Grand Resort & Spa

- Experience our small-format workshops where you can drill down deep into the details of design and implementation of HWB programs, in which HERO brings you an unbiased, evidence-based, employer-focused view
- Hear from the industry's top innovators in hands-on workshops
- Create a new level of engagement in your company by learning and networking with top thought leaders



HERO Health & Well-Being (HWB) Best Practices Scorecard in Collaboration with Mercer®

The HERO Health and Well-Being Best Practices Scorecard in collaboration with Mercer® (HERO Scorecard) is designed to help employers, providers, and other stakeholders identify and learn about workplace HWB best practices. It is divided into six sections representing the foundational components that support exemplary HWB programs. While no inventory of best practices will include all innovative approaches, the HERO Scorecard utilizes those most commonly recognized among industry thought-leaders and in published literature.

The HERO Scorecard asks detailed questions about employers' program design, administration, and experience, and then assigns respondents an overall score out of a possible 200 points. While a score of 200 is theoretically possible, it is not likely or even desirable for an employer to have every possible program and strategy in place. A separate Program Outcomes section is included to serve as a guide for a "dashboard" of metrics that may be useful in assessing program success. Information in this section does not contribute to an organization's best practice score, but will be used (and expanded upon over time) to develop outcomes benchmarks.

The HERO Scorecard was initially developed in 2006 and has been updated several times to reflect the evolution and maturation of the field. The most recent update of the US version was released in 2014 and a new international version was released in 2016.

Ongoing data analyses are conducted on a normative database and commentaries are published in Quarterly Benchmark Reports as well as in HERO blogs and member newsletters. As of January 2016, the US normative database represents nearly 400 employers and are well distributed in terms of organization size and industry.

The HERO Scorecard is an online tool. When employers submit their responses to the online system, they immediately receive a return e-mail containing a free report that includes an overall score and a score for each of the six sections compared to national average scores. While the employer's score indicates how their program generally compares to those of other employers, the Benchmark Report reveals how common each of the HWB practices are among all respondents.

Scorecard Sections

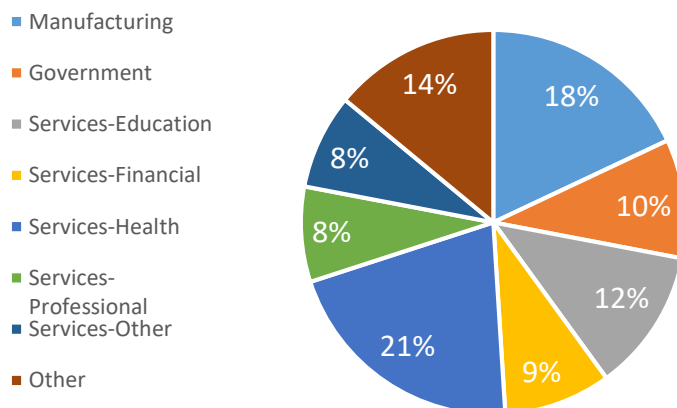
Section 1: Strategic Planning	• Needs assessment, measurable goals, total population health strategy, aligned with business results
Section 2: Organization and Cultural Support	• Senior leadership commitment, manager support, policies, physical environment support, employee involvement, ambassadors
Section 3: Programs	• Health assessment, health improvement, health consumerism, Disability management
Section 4: Program Integration	• Integration with other departments, benefit plan design and access
Section 5: Participation Strategies	• Communication strategies, incentives, social media, social support
Section 6: Measurement and Evaluation	• Collection and use of data for program evaluation and reporting

Companies in Normative Database by Organization Size

HERO HWB Respondents by Employer Size	%
Employers with < 500 employees	29%
Employers with 500 – 4,999 employees	43%
Employers with 5,000 or more employees	26%

Companies in Normative Database by Industry Category

Industry Categories Represented in HERO Scorecard Database (January 2016)



Based on 396 employers in the HERO Scorecard Quarterly Benchmark Report, January 2016

Benchmark Reports

Drawn from the full HERO Scorecard database, the Benchmark Report compares program strategy, design and outcomes for employer benchmark groups based on industry, size, and geographic location. This comprehensive data report is built in Excel and comes with a template that enables users to easily create a printer-friendly report that displays up to three benchmark groups (along with the results for all respondents). The report includes an introduction and brief commentary on the findings by industry experts. Benchmark reports are available to HERO Scorecard Preferred Providers as part of the license fee and to all others for purchase.

Ongoing data analysis from the normative database provides unique insights about organizational use of HWB practices, associations between the six measured domains in the HERO Scorecard, and their relationship with self-reported outcomes.

These analyses serve as a foundation for future research because they inform the development of new research questions and identify areas of promising practices that can be systematically tested and validated against other databases. For example, a recent analysis demonstrates the importance of organizational culture, an ongoing area of HERO research.

These analyses also support the internal validity of the HERO Scorecard, which may pave the way for more rigorous validation research. For example, one analysis of the normative database indicated that certain practices are associated with superior health care cost trends. This analysis based on self-reported data on the HERO Scorecard led to the development of a more formal research study that leveraged health care cost and risk data in a third party database. This formative study also informed changes in the scoring when the HERO Scorecard was updated in 2014.

The HERO Scorecard is occasionally leveraged for formal research studies. HERO researchers partnered with researchers from Emory University and Truven Health Analytics to determine the ability of the HERO Scorecard to predict changes in health care expenditures. While both study groups had favorable health care cost trends, organizations with high scores experienced significant reductions in inflation-adjusted health care costs compared to more stable cost trends for low-scoring organizations. This study supported the predictive validity of the HERO Scorecard based on hard outcomes data.

Participation Rates Rise With the Level of Organizational Support for Health

Program component	Average program participation rate		
	Low support	Moderate support	High support
Health assessment	30%	46%	59%
Biometric screenings	33%	45%	53%
Disease management programs	15%	24%	27%
Lifestyle change programs	13%	21%	28%

Source: Flynn J. Understanding the importance of organizational support. HERO Employee Health Management Best Practice Scorecard in collaboration with Mercer Annual Report – 2014:12-13.

Five Key Influences on Reported Medical Savings Percentage of respondents reporting savings due to EHM



Source: Goetzel et al. The predictive validity of the HERO Scorecard in determining future health care cost and risk trends. Journal of Occupational and Environmental Medicine. 2014;56(2):136-144.

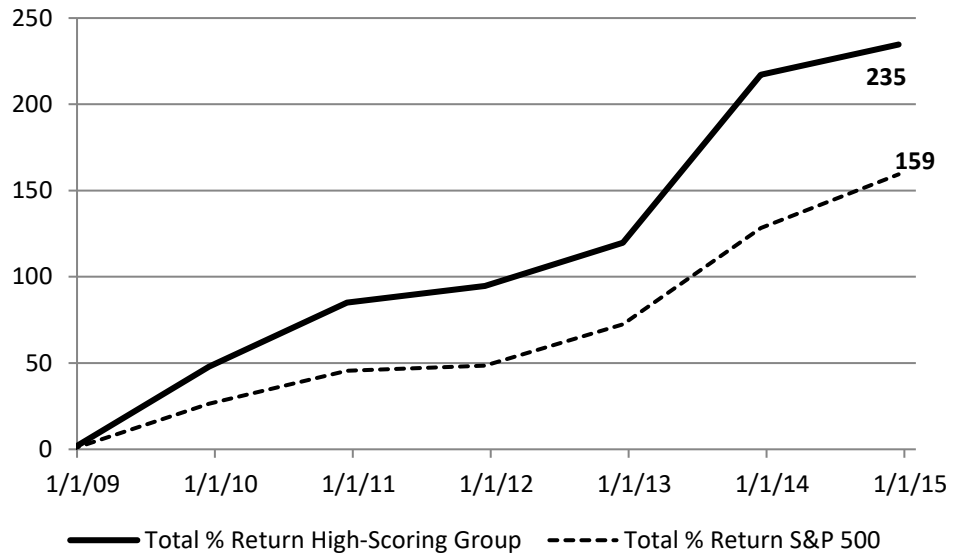
Predicted Average Annual Health Care Expenditures (Adjusted to 2012 Dollars) for Organizations With High and Low HERO Scores



Source: Gold D & Umland B. Relating the use of best practices to outcomes. HERO Employee Health Management Best Practice Scorecard in collaboration with Mercer Annual Report – 2012. 2012:5-7.

A subsequent study tested the association between the practices listed on the HERO Scorecard and company financial performance. The study evaluated the stock performance of publicly traded companies that received high scores based on their implementation of evidence-based workplace HWB practices. A simulation analysis compared the stock price trends of a portfolio of high-scoring companies against past performance of companies represented on the Standard and Poor's (S&P) 500 Index. Stock values for the high-scoring portfolio appreciated by 235% compared with the S&P 500 portfolio appreciation of 159% over a 6-year simulation period. Robust investment in a workforce health and well-being appears to be one of multiple practices pursued by high-performing, well-managed companies.

Relative Performance of HERO Scorecard High-Scoring Portfolio Compared to S&P 500 – Percent Return

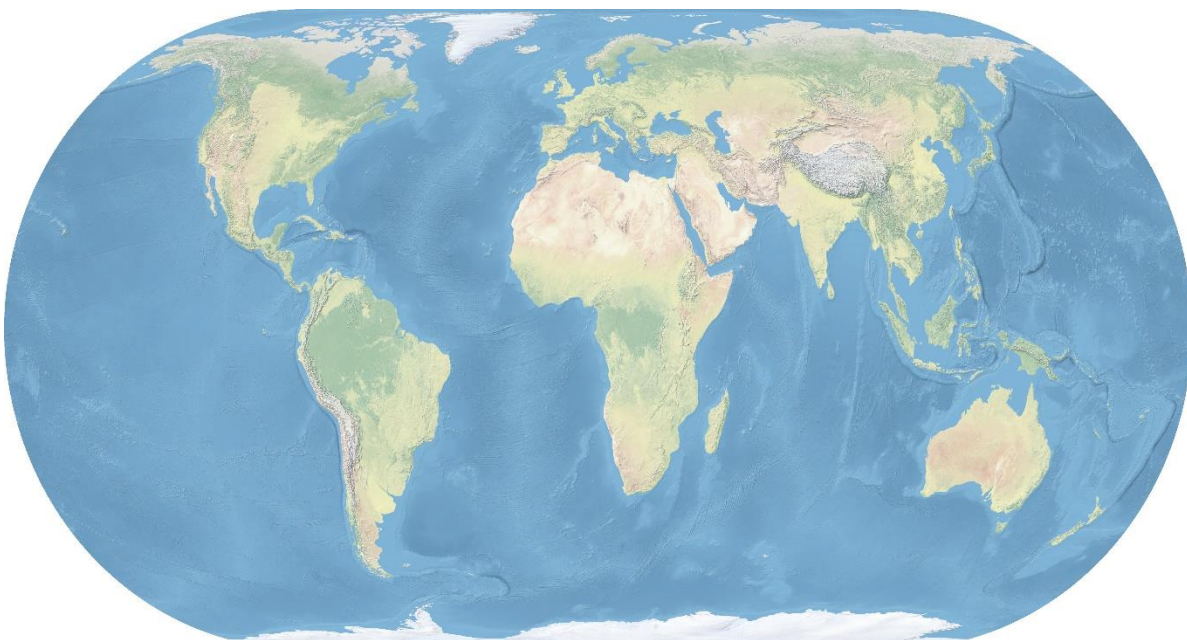


Source: Grossmeier et al. Linking workplace health promotion best practices and organizational financial performance: Tracking market performance of companies with highest scores on the HERO Scorecard. *Journal of Occupational and Environmental Medicine*. 2016;58(1):16-23.

In February 2016, HERO launched an international version of the HERO Scorecard, enabling employers who invest in HWB initiatives to compare their program and outcomes to other organizations in their industry and in important geographic locations as they work to continually refine and improve their efforts. The international version relied on the practices and scoring used in the US v4 version to enable multinational companies to support HWB practices in one country to those used in the US. As the normative database grows for the international version, organizations will also be able to compare HWB practices from one country to another outside of the US.

“The HERO Best Practices Scorecard was very valuable in helping us understand how our program compared to other Best Practice programs. The data helped us build greater shared accountability across stakeholder groups when gaps were identified.”

K. Andrew Crighton, MD
Prudential Financial





Research, Outreach & Collaboration

HERO's Research Agenda

HERO's research extends well beyond the HERO Scorecard. Since the organization's formation in 1996, HERO has produced ground-breaking research on health-related business outcomes of importance to employers. HERO conducts its research using the highest standards of rigor while also keeping in mind that findings must be practical and applicable to real-world business settings. Most HERO research studies are published in peer-reviewed scientific journals to broaden their impact well beyond HERO's membership, although findings are shared well in advance of publication with HERO Think Tank members.

The HERO research agenda reflects the research issues most important to HERO members. HERO members meet annually to review key HWB research activities completed over the preceding twelve months, discuss emerging industry trends and share their thoughts on important research topics that should be studied in the future. The results of that meeting are reviewed by the HERO Research Advisory Group (RAG), a subcommittee of the HERO Research Committee comprised of outstanding leaders in research, business and education with many years of experience in the field. Based on their expert review, HERO leadership finalizes the agenda that will guide HERO's research priorities in the coming year. The current research agenda is available on the [HERO website](#).

Accomplishing the Research Agenda

The HERO Research Committee is comprised of three subcommittees including the Research Advisory Group (RAG), the Measurement Standards Subcommittee (MSS) and the Research Study Subcommittee (RSS). The RAG establishes HERO's research agenda and priorities while the RSS provides guidance and oversight of new research studies. The MSS provides data from the HERO Scorecard to inform new research and also establishes standards for measurement in the workplace health and well-being field. Additionally, topic-specific Study Committees outside of the Research Committee often set the foundation for HERO research projects by helping members understand what is already known about a given topic and by identifying knowledge and research gaps. This work provides the foundation for identifying opportunities for focused formal research studies. The Research Committee and the Study Committees are collectively charged with the production of research reports, presentations, and/or published papers to share what they've learned as a result of their research activities. The HERO website

provides a list of all HERO [research studies](#) published to date as well as [study committee publications](#) and reports.

Success through Collaboration

Collaboration has been central to HERO's efforts to move the workplace HWB evidence base forward. Three examples of those efforts are:

- 1) HERO has partnered with The Health Project, the non-profit organization that created and manages the prestigious C. Everett Koop Award for best-in-class workplace HWB programs. The Health Project presents these awards at the HERO Forum, which provides a national platform for recognizing programs that demonstrably improve health and reduce costs based on rigorous evaluation.
- 2) HERO collaborated with the Population Health Alliance (PHA) to identify and recommend a core set of metrics for the HWB industry. Released in 2015, the [Program Measurement and Evaluation Guide: Core Metrics for Employee Health Management](#) was developed by subject matter experts from over 40 organizations and more than 80 individuals representing all industry segments, including employers, health plans, program providers, academic research centers, consulting firms and certification agencies. HERO is moving to establish standard measures that will help better document the impact of workplace programs. Now in beta test phase, future work will include beta case studies and updates to the Guide.
- 3) The Affordable Care Act has codified the rules allowing employers to offer financial incentives as part of their programs based on the achievement of health standards such as not using tobacco and attaining acceptable levels for blood pressure, BMI and cholesterol. These outcomes-based financial incentives can currently be as much as 20% of the total cost of relevant health care coverage, and this amount increases to 30% in 2014.

There has been wide debate on the advisability of this legislation. HERO, working in collaboration with the American Heart Association, American Cancer Society, American Diabetes Association and the American College of Environmental and Occupational Medicine (ACOEM) has developed a document for employers and regulators providing guidance on how to create a reasonably designed wellness program and a HIPAA-compliant incentive design that will improve employee HWB and avoid illegal discrimination. This consensus guidance document can be viewed on the HERO homepage [here](#).



Current Think Tank Member Organizations

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Boeing Company
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The Cooper Companies
Corning Incorporated
Cummins, Inc.
Garmin International
Goldman Sachs
Google
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Johnson & Johnson
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Lincoln Industries
Lockheed Martin
Lowe's Companies, Inc.
Marathon Petroleum Company
Northwell Health
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Pfizer
Prudential Financial
Shell
Stryker
Target
Wells Fargo
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Georgia Institute of Technology
Michigan State University
Northwestern University
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Aon Hewitt Consulting
Conduent HR Services
Findley Davies
Hays Companies
HUB International
Hylant
Lockton
Marsh & McLennan Agency
Mercer
Merritt Advisors LLC
Performance pH
Truven Health Analytics
Willis Towers Watson

PUBLIC SECTOR

Hennepin County HealthWorks
Howard County Public School System (Maryland)
National Security Agency

ASSOCIATIONS/FOUNDATIONS/NON-PROFITS

American Council on Exercise
American Heart Association
American Psychological Association
Robert Wood Johnson Foundation
Worksite Wellness Council of MA

HEALTH CARE PLANS & SYSTEMS

Aetna
American Council of Engineering Companies Life/Health Trust
Blue Cross & Blue Shield of MA
Blue Cross & Blue Shield of MN
HealthPartners
Humana Wellness
Intermountain Healthcare/SelectHealth
Kaiser Permanente
Mayo Clinic
Medical Mutual of Ohio
Mission Health Systems
Norton Healthcare
OhioHealth
Prevention Partners
Sarah Bush Lincoln
Tufts Health Plan
UPMC Health Plan
Wespath Benefits and Investments

EMPLOYEE HEALTH & WELL-BEING PROVIDERS

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Accolade, Inc.
Activate Healthcare
Active Health Management
ADURO
American Specialty Health
Best Doctors
Bravo Wellness, LLC
Corporate Health Partners
EHE
Environ
Envolve
Ergotron, Inc.
EXOS
HealthCheck360°
HealthFitness
HealthSTAT, Inc.
Healthways
Info Tech Inc.
Interactive Health Solutions
Jiff
LifeSpeak, Inc.
Limeade
Mediterranean Wellness
meQuilibrium
Noom
Onlife Health
OnSite Wellness LLC
Optisom
Optum
Preventure, Inc.
Provant
Quest Diagnostics
RedBrick Health
StayWell
Virgin Pulse
WebMD Health Services
Welltok
Zipongo



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