HERO SUMMER THINK TANK PROCEEDINGS

Developing Dashboards that Engage Leaders at All Levels
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DASHBOARDS, CREDIBLE DATA, AND REACHING YOUR DESTINATION

by Paul Terry, PhD, HERO President & CEO

"It's the journey, not the destination." Such is a commonplace sentiment for leisure travelers, but does it apply to advancing health and well-being in corporate America? Hardly. For those of us responsible for delivering healthy results to bosses, boards or, most importantly, the end users of our services, it's rarely the case that we earn accolades, promotions, bonuses or simple credit for a job well done if we can't report some measurable progress toward clearly stated goals. Imagine an annual report that begins, "We didn't achieve our goals, but we sure had a great time along the way!" We dove into dashboards at HERO's 2018 Summer Research Think Tank as a way to examine how to best capture the metrics that matter most for identifying ambitious but achievable destinations in employee health and well-being. What's more, this Think Tank's designer and leader, HERO's Dr. Jessica Grossmeier, brought together a well-traveled blend of dashboard experts and worksite health promotion practitioners who could challenge us to broaden our thinking about dashboards and destinations. How can we design, disseminate and monitor

dashboards such that they are relevant and comprehensible to stakeholders throughout an organization?

An analogy to well-being dashboards that occupied my mind daily the month before this Think Tank was the "dashboard data" used in orienteering through the wilderness. That's because while Dr. Grossmeier spent May putting final touches on this summer's Think Tank, I spent all of May through-hiking the 270-mile Superior Hiking Trail. It was only a few days into our journey that my hiking buddy Jeff, exhausted and exasperated, said, "How is it that two guys with advanced degrees and years of hiking experience keep getting lost?" The Latin root for being humbled is being "grounded." And as humiliating as it felt to be lugging heavy backpacks on unforeseen detours, losing our way offered lasting lessons about the foibles of ostensibly credible sources of data. Maps are accurate until they're not after loggers decimate wide swaths of trail. GPS pinpoints you precisely but worthlessly if not synched to a visibly accessible trail.

And what is the most reliable source of favored destinations but, at the same time, the least reliable source of data for finding the way? People! Fellow hikers offered us rich sources of information about awesome vistas and hazards to avoid, but we came to distrust the vagaries of hikers' recollections of trails that they had traveled just a day or so before. And so it is with developing well-being dashboards. As much as my through-hiking experience had me rejecting the "it's the journey" bromide, more than ever I came to appreciate that other platitude that "good decisions require good information." As you will learn in our Think Tank Proceedings that follow, the surest way to build a dashboard that is timely and relevant is to conscientiously engage a wide array of stakeholders. Choosing a worthy destination occurs while patiently stoking the perfect campfire. It shouldn't be hurried. But once you're laboring under the weight of a heavy pack, like the precious time and resources you've been entrusted with to get somewhere, analyzing key metrics and making data-informed decisions alongside hurried and data-oblivious stakeholders can feel pressure-filled and urgent.

Two fabulous books that offer contrasts into decision making and the use of data came to mind often as we got quicker at noticing when we were lost and better at staying on course. Malcolm Gladwell's "Blink" offers fascinating stories about how experts can instantly see what others miss.

After weeks of walking in the woods, I came to appreciate how my eyes were indeed my most reliable source of information about the trustworthiness of the path I was on, if only I'd use them more carefully. Is it also the case that we are under utilizing our vision for gauging how well our health and well-being initiatives are aligned with the pace and horizons sought after by our organizations' leaders and people?

As much as there is a "dash" in dashboards, Nobel prize-winning psychologist Daniel Kahneman's book, "Thinking Fast and Slow," is a fascinating, albeit dense, book that affirms my hiker's observations that people's memories and related judgements about the way to get somewhere are, shall we say, imperfect. Their quick, decisive directions too often lead to long, arduous treks to dead ends. I've long held that strategic planning is the time to slow down and invoke disciplined reflection into our output-oriented work days. Kahneman, who is credited with leading the behavioral economics movement, has shown time and again that making judgements in a blink will more often than not send us down the wrong trail. In reading the Proceedings that follow, keep in mind that in our usual HERO Think Tank fashion, we took our time and deliberated carefully to produce what I trust is the current best route to developing dashboards that will take us further than ever before.

PANEL ONE: DEVELOPING AND DESIGNING AN EFFECTIVE DASHBOARD APPROACH

by Jessica Grossmeier, PhD, MPH, HERO Vice President of Research

GUEST SPEAKERS

WENDY LYNCH, PhD, Founder, Lynch Consulting Ltd.
BRIDGET NEURER, Senior Vice President, Aon
BRAD SMITH, PhD, Vice President Reporting and Analytics, meQuilibrium
SHELLY WOLFF, MBA, Health & Workforce Effectiveness Leader, Willis Towers Watson

Late last year I started working with HERO Research Committee leaders to design a Think Tank that would provide members with valuable guidance on how to approach measurement, reporting, and dashboard development within their organization. As I reached out to recommended subject matter experts in the arena of health and well-being measurement, I quickly discovered there was not an authoritative single point of view on how to approach it most effectively. Our opening panel at the Summer Think Tank represents more than 100 years of experience working with many different types of organizations in different contexts to help them develop measurement strategies that make information meaningful and actionable for intended end users.

The conversation started by level-setting the terms associated with measurement, analytics, reporting,

dashboards, and scorecards. Shelly Wolff distinguished between a measurement strategy (a disciplined framework that incorporates both measurement and analytics to inform action) and analytics (the process of extracting insights from data). An important first question she poses to her clients is, "what is it you are trying to accomplish?" in order to understand how information will be used by a specific set of stakeholders. Wendy Lynch offered some thoughtful reflections on what it means to have a dashboard and how the timing or sensitivity of a given metric might influence how useful it is on a dashboard, because timing and sensitivity have implications for decision making. As metrics become more variable or actionable, they are more likely candidates for a dashboard.

A key theme throughout the day was raised early by our panelists: the need to consider your end users and what is

most important to them. Brad Smith shared a list of the people he's discovered are essential to bring into the conversation when developing a measurement and reporting strategy for an organization, including data owners, senior leaders, subject matter experts around interpretation/meaning of the data and technical/visual data display, as well as end users of the dashboard.

The most insightful elements of the panel discussion were the stories and lessons learned that these subject matter experts shared about their work with organizations. Bridget Neurer shared an example of a resource intense measurement project that quickly changed its focus after pausing from months of stakeholder discussions to check in with the CEO on what was most important to measure. Her story instigated a rich session of reflections from the other panelists on lessons they'd learned from their experiences with employers, including the needs to:

• understand the bigger organizational focus and how health and well-being is connected to broader organizational goals,
• evolve one's strategy over time,
• start somewhere and prototype an approach to get feedback on what is most meaningful,
  • keep metrics simple enough for a wide range of stakeholders to understand, and
    • think through how data will be used by different stakeholders.

A final key takeaway for me was the emphasis on honing and developing a skill that all of us would be well served by strengthening, and that's listening. Wendy Lynch shared some suggestions on types of questions to ask stakeholders and what to listen for. The need to listen well for stakeholder needs was the focus for our panelists' closing suggestions. Brad Smith picked up on Bridget Neurer's earlier point that it's important to start somewhere and allow stakeholders to react to an initial set of ideas, listening for what is useful. Bridget Neurer reminded us to consider sharing information with employees across the organization to understand what is most meaningful to them. Shelly Wolff reflected that value drivers may be found when we look outside of our own disciplines to consider the bigger framework of the organization and how others might respond to similar information or metrics. Wendy ended with the suggestion that it's helpful to have a client imagine how they will use information or data before committing the resources to add it to a dashboard or report.

The panel session closed with a robust question and answer period from Think Tank attendees. If you're curious to hear the questions posed by Think Tank members such as David Anderson, Pari Luna, Sara Johnson, and Nico Pronk, you'll want to take some time to listen to the full recording.

HERO Think Tank members may access the recording **here**.

PANEL TWO: EMPLOYER CASE STUDIES: GETTING TO WHAT MATTERS WITH MEANINGFUL USE OF DATA

by Mary Imboden, PhD, MS, HERO Membership Manager and Research Associate

GUEST SPEAKERS

LAURA ELLISON, MBA, Senior Manager of Benefits, ADT
ROBERT CARR, MD, MPH, President, American College of Preventive Medicine
WALEED BAHOUTH, JD, Director of Associate Well-being, Humana
KEITH WINICK, MA, Director of Health and Wellness & Analytics, Prudential Financial

The morning panel shared useful information on developing measurement strategies for obtaining meaningful information that can be used to move closer to the goals of one's company. This may have left many asking, "How can these strategies be implemented?" The second panel, again with over a century of experience, was selected by HERO to share how the insight from the morning panel can be translated into real world scenarios.

Laura Ellison, MBA, Senior Manager of Benefits, ADT

Panel two started with Laura Ellison sharing ADT's journey in creating a scorecard. Although ADT has a history of 140 years and over 18,000 employees, they are newer to the dashboard scene. After being separated from Tyco in 2012, ADT lost all historical data on their employee population and did not collect their first health assessment data until 2015. ADT began to develop their scorecard in 2015 for their wellness program team, focusing predominantly on benefits. However, as more data were collected, ADT decided to transition the scorecard from having merely a benefits perspective to measuring the value of physical, emotional, financial, and social health from a business perspective, reporting to their leaders measures of key physical risks, key emotional risks, participation, organizational support, etc. Along with presenting the data, the ADT scorecard also provides a "Why it Matters" snapshot for leaders, highlighting the importance of simplicity. As the scorecard has evolved and continues to evolve, ADT has identified important measures that need to be assessed, as well as provided data driven recommendations based on the line of business of their employees.

Robert Carr, MD, MPH, President, American College of Preventive Medicine, and former Chief Medical Director, GlaxoSmithKline
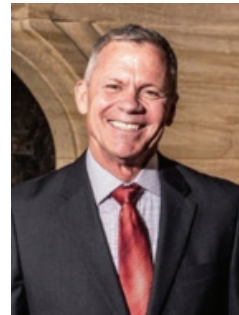
Dr. Robert Carr (Bob) shared his experiences at GSK, a science-led global healthcare company with more than 120,000 employees residing in 129 different countries, in a variety of professions. The size and dispersion of the organization increases the complexity of aligning messages across the organization. Bob strongly emphasized the art of listening and asking the right questions to better understand the needs of all employees, as well as the importance of fostering leadership commitment in creating a culture of health and well-being. He further discussed the approach GSK took to develop a dashboard that engaged leaders and represented their organizational needs, which included asking top line leaders what they believe it means to live a healthy life and what a healthy organization means to them. This identified four focus areas for their dashboard—healthy minds, healthy bodies, healthy leadership, and healthy facilities—with elements under each area that were determined as having the greatest contribution to the overall score for each area. This has allowed insight into the greatest needs across the organization and helped identify where programs and services need to be implemented to create an environment filled with positive energy, where employees feel they can be their greatest self.

Waleed Bahouth, JD, Director of Associate Well-being, Humana

Dr. Waleed Bahouth shared Humana's vision to help employees achieve lifelong well-being, which includes finding a direct link between their work and purpose in life. Humana developed their well-being snapshot, a dashboard that represents their health and well-being goals and their success in achieving these objectives. Waleed explained three big themes in their dashboard development, including professionalizing their practice, measuring what matters most to leaders, and continuing to simplify. Each of these major themes represented a step along Humana's dashboard journey. The dashboard began with over 100 metrics, focusing on purpose, security, health, and belonging and sought to assess how these measures link to business results. Waleed described how this comprehensive dashboard allowed them to build credibility and communicate the value to leaders. Once credibility was established, the focus turned to measurements that mattered most to their leaders and mobilizing grassroots efforts to align messages across the organization. As data collection continued, Humana recognized the importance of simplicity and created a dashboard that includes five metrics and one number in the middle which provides leadership a high-level understanding of whether they are on the right track towards reaching their health and well-being goals.

Keith Winick, MA, Director of Health and Wellness & Analytics, Prudential Financial

Keith Winick discussed Prudential Financial's goal to engage its business leaders in promoting a culture of health across the organization. To help demonstrate the value of employee health on business performance, Prudential developed their health and well-being dashboard, which has evolved through the collection of relevant data and analytic insights. Keith explained how their health and well-being dashboard was developed to focus on their five dimensions of health—physical, emotional, spiritual, financial, and social—as well as the impact of supervisor/leadership support in these five dimensions. Prudential also has added metrics to their dashboard to help leaders understand measures that they can influence and to provide a comparison on how different business groups measure up to Prudential's overall score. This comparison provides insight to leaders on opportunities for improvement, areas of excellence, and areas of concern. Additionally, Keith described how these results have fostered a sense of ownership for their leaders and has helped establish new programs that promote health and well-being.

As I listened to these experienced panelists tell their organization's story, I picked up on a few key points that were shared across all. First, their dashboards were not built in a day; it took time. Second, the dashboard evolves as more data are collected, becoming more aligned with the vision of the organization and what matters most to leaders and stakeholders. Finally, simplicity is important, therefore organizations are continuously developing their dashboards as they determine what matters most and how to present this data in the most simplified way.

HERO Think Tank members may access the recording **here**.

MEASUREMENT RESOURCES FROM 100 MILLION HEALTHIER LIVES

by Karen Moseley, HERO Vice President of Education and Director of Operations

GUEST SPEAKER

SOMAVA STOUT, MD, MS, Executive Lead, 100 Million Healthier Lives; Vice President, Institute for Healthcare Improvement

Dr. Soma Stout helped to launch the afternoon discussion with an introduction to 100 Million Healthier Lives **(100MLives)**, a collaboration of more than 1800 partners in more than 30 countries. Convened by the Institute for Healthcare Improvement, 100MLives is pursuing a vision "to fundamentally transform the way we think and act to improve health, well-being, and equity."

While 100MLives may have been new for some attendees, its relevance to this Think Tank, and to employers in general, was immediately apparent. Soma highlighted key elements of the value proposition: (1) chronic disease is costing billions not only in healthcare costs, but also in worker productivity and absenteeism; (2) "diseases of despair" are impacting workers, families and communities; (3) the gap between those who have access/opportunity to live healthy and those who do not is widening, and these inequities carry costs. If we are going to achieve better outcomes in health, we need to change how people think about health.

When measures include overall well-being—physical health, mental health, social well-being, spiritual well-being, health risks—we're able to see a more complete picture of health at individual and organizational levels and to better identify the opportunities to influence it. 100MLives provides simple tools that can be applied in a number of settings, including the workplace. For example, employers can use the adult **well-being assessment** to measure the self-reported well-being of their employees, which is predictive of long-term outcomes, such as morbidity, mortality and cost. **Resources** that are publicly available on the 100MLives website include a conceptual framework; common measures, instruments, and scoring guidance; and a free platform to identify, collect, track and share measures that matter for your workplace/ community.

HERO Think Tank members may access the Soma's recommended resources from 100MLives, her slides, and the recording of her remarks **here**.

CONTEXT MATTERS! APPLICATION OF DASHBOARD CONCEPTS TO EMPLOYER CASE STUDIES

by Emily Wolfe, MSW, LSCW, CHWC, HERO Committee Project Manager

DISCUSSION FACILITATORS

TRACY BADE, MPH, Population Health Leader, Target
DINA FONZONE, MBA, MAEd, Vice President, Health Risk Management, Scott Insurance
STEFAN GINGERICH, MS, Senior Research Analyst, StayWell
JILL HAMILTON, MEd, HealthWorks Manager, Hennepin County
KRISTI RAHRIG JENKINS, PhD, MPH, Research Program Manager, University of Michigan
MARY KRUSE, MS, President and CEO, HealthSource Solutions, LLC
JUSTIN SCHANEMAN, MS, Vice President of Data Analytics, HCMS Group
CHRISTOPHER THOMAS, MS, Senior Manager, Pacific Gas and Electric Company

One of the themes that surfaced many times during the morning portion of the June 19th Summer Think Tank was the need to develop a dashboard approach while keeping in mind what is most meaningful to the specific stakeholder group for which it is being developed. The afternoon portion of the Think Tank focused on applying concepts learned from the morning panel discussions to hypothetical employer case studies. Think Tank attendees were invited to participate in a discussion group focusing on a case study from one of these industries: financial services, healthcare, hospitals, manufacturing, retail, transportation, university and utilities. Each case study highlighted several stakeholder groups, key areas of focus for varying stakeholders, available data, current metrics, and possible areas for collecting new and more meaningful data. Group members reviewed the employer case studies and made collective recommendations.

While industry types were varied, key themes emerged from each round table discussion. From the importance of understanding the mission or goal of your company, to bringing all stakeholder voices to the table, it is critical to identify what metrics matter and how they can lead to continued improvements or actionable strategies. Each round table group agreed: it is first essential to identify who the different stakeholders are within an organization and what metrics matter most to them. It is common for employers to have stakeholder groups with competing priorities and thus the need for collecting varying levels of meaningful data. Some consistent examples of measures that mattered most among case study groups included safety, fatigue, cost, retention, absenteeism, engagement, social connection, leadership sup-

port, purpose and chronic condition management, just to name a few. Additional questions were explored during table discussions: (1) As data is collected using key metrics, how can employers ensure meaningful comparisons are identified? (2) How can you connect what is being learned to current and future health and well-being initiatives? Across industries, each group identified an increased need to ask middle managers and front-line employees what they need and then listen to their response. Often leadership teams make decisions from the top down, focusing on one stakeholder group without fully understanding the steps that need to be taken to make meaningful change or even how to measure such change.

In summary, measurement is ultimately a reflection of clarity of thought. As you seek to develop a data dashboard, it is important to ensure you have a total understanding of what your stakeholders want, who they are, what goals you want your interventions to achieve, and how you are measuring these goals. How do you do this? Where do you start? Some organizations may start by doing something and keeping it simple. You do not need 100 metrics! Perhaps it starts with a single composite score. Don't allow the fear of perfection to stop you from starting the process of collecting meaningful data and using what you learn to build upon your success.

HERO Think Tank members may access the Discussion Table case studies **here**.

HERO RESEARCH UPDATES

by Jessica Grossmeier, PhD, MPH, HERO Vice President of Research

GUEST SPEAKERS

SARA JOHNSON, PhD, CEO, Pro-Change Behavior Systems
STEVEN NOELDNER, PhD, HERO Research Committee Chair

In a day focused on measurement, metrics and data, it made sense to update HERO Think Tank members on the emerging research and publications from HERO that advance **HERO's Research Agenda**. I called attention to two recent publications in particular. The first was a systematic literature review led by Jennifer Flynn and members of the Culture of Health Study Committee. The paper, "Supporting a Culture of Health in the Workplace: A Review of Evidence-based Elements," is summarized on the HERO Research webpage and is available in full text on the *American Journal of Health Promotion* website. The review identifies and evaluates the evidence base for 24 culture of health elements identified by the HERO Culture of Health Study Committee. Of 1,023 identified articles, 105 were abstracted and summarized in this systematic review. The second publication highlighted was a HERO position paper on how to critically assess published research making claims about the effectiveness of workplace health and well-being initiatives. A **summary** of tips and recommendations for critical review of research is available to the public as a HERO Blog and is written for

non-researchers. **A longer version** has been published for HERO members in the HERO Think Tank Library, which fleshes out the tips and recommendations and applies them to a recently published research study on the University of Illinois workplace wellness program.

HERO is in the process of advancing two formal research studies, including one on incentives and one based on the HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer (HERO Scorecard). The incentives study is based on de-identified client data provided by three HERO member organizations that provide health and well-being programs and services to employers. The study aims to examine which types of incentive structures are associated with better population-level health outcomes. The data has been collected and integrated and is currently being subjected to a feasibility assessment to determine how to move forward with a study. HERO's second study leverages data collected from the HERO Scorecard to assess the relationships between organizationally reported health and well-being practices, turnover rates, and employee

perceptions about health and well-being. The study is in the data analysis phase, which is being led by researchers from Pro-Change Behavior Systems. Dr. Sara Johnson shared an overview of the study and preliminary findings from a factor analysis conducted to develop a reduced set for HERO Scorecard study variables.

Dr. Steven Noeldner provided an update on a targeted communication campaign to encourage employers to complete the HERO Scorecard in order to support HERO's ongoing research in which health and well-being best practices are associated with superior outcomes. In an analysis of 845 organizations that have completed the US version of the HERO Scorecard, we discovered that only 23% of HERO member organizations have completed it. Of all Scorecard submissions, only 7% of organizations have

completed it more than once. Steven shared summaries of recently published HERO Scorecard commentaries to demonstrate the valuable insights we glean from the database each quarter. These commentaries are published in the **HERO Blog** as well as in the bi-annual **HERO Scorecard Progress Reports**. Each quarter, HERO will be targeting a different group of employers, encouraging them to complete the HERO Scorecard for the first time, or to repeat completion if they've taken it in the past. Such efforts support new studies that help us understand how health and well-being practices change over time and how those changes influence outcomes.

HERO Think Tank members may access the recording **here**.

Note: Presentation materials can be found in the members only Think Tank General LIbrary

KEY TAKEAWAYS AND OBSERVATIONS

by Jessica Grossmeier, PhD, MPH, HERO Vice President of Research

GUEST SPEAKER

SETH SERXNER, PhD, HERO Board Chair

HERO's Board Chair and Research Advisory Group Chair, Dr. Seth Serxner, closed the meeting by reflecting on key themes raised during the day:

• The way we measure health and well-being is a reflection of the clarity we have about how the data will be used.

• The degree to which a dashboard meets stakeholder needs is influenced by our understanding about what they care most about and how health and well-being initiatives are connected to what matters to them.

• Meaningful dashboard development must begin by identifying who the end users and stakeholders are.

• Middle managers are important targets to determine key measurement metrics.

• We need to "keep it simple" when it comes to dashboard development.

Oftentimes we don't need 100 metrics but rather a few carefully selected metrics or a single composite score.

• Many different proposed metrics emerged during discussions, but it was also interesting to note what didn't come up. Employers are often interested in business performance metrics. Health literacy and health advocacy didn't really come up, but they are important. Additionally, the industry is now talking a lot about mental health, but the right metrics still need to be identified.

• We also need to consider the role of vendor partners in all of this because many dashboards rely on reports produced by vendor partners.

HERO Think Tank members may access the recording **here**. Seth's recorded remarks begin at approximately 29 minutes into the recording.

Note: Presentation materials can be found in the members only Think Tank General LIbrary