

HERO STRATEGIC PLAN 2021- 2026

Connecting Science to Practice

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Version 2.0

4.10.2021

HERO
2021 – 2026 Strategic Planning
Outline

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HERO

2021 – 2026 Strategic Plan





1.) Strategic Planning Approach

The five-year Strategic Planning process was launched with the full Board in attendance at the February 2020 Board of Directors meeting. To help frame our strategic planning process, Human Centered Design Thinking -- a management and design framework that **develops solutions to problems** by involving the human perspective in all steps of strategic planning -- was used. Human Centered Design typically takes place by observing the problem within context, brainstorming, conceptualizing, developing, and implementing the solution. Human Centered Design Thinking begins with a set of principles that get to the heart of these questions. These principles provide the foundation for delivering solutions that meet or exceed end user/customer’s expectations. To be successful, they must speak to a customer’s heart as well as its head.

The approach used was a modified version of IBM Watson Health and Willis Towers Watson’s methodology. HERO defined the end user as employers of all sizes. The power of this approach is to anchor a new strategy which clearly defines the user and their needs, allows teams to creatively solve problems and use regular feedback loops. This helps to assure HERO creates a better future for employers (and thought leaders) on behalf of the health and well-being (HWB) of employees. The ultimate success measure is to improve the health and well-being of employees, families and communities. We advance best practices in workplace health and well-being improvement by earning the trust, respect and ultimately, new and sustained membership in HERO.

HERO STRATEGIC PLANNING 2021-2026

DESIGN THINKING FRAMEWORK

			
Discover	Ideate	Build	Operate
<ul style="list-style-type: none"> • Understand our vision, purpose and values • Gather relevant research and data 	Leverage human-centered design process	<ul style="list-style-type: none"> • Develop Strategic Plan • Organize through research, programs and resources 	Measure strategy and program success

Key Focus Areas			
Current State	Newspaper Exercise	Priority Setting	Organizational Performance
Member Data	Strategic Values and Purpose	Road Map	Member Value
Market Data Insights	Empathy Mapping SWOT Analysis Scenario Planning	Research and Evidence	Industry Behaviors
Member/Participant Data & Research	Converging	Membership & Governance	Health and Well-being Goals

Of note, after our strategic planning launch in February 2020, a global pandemic was declared in March and we suspended our planning until December of 2020. We expect to finalize our plan by April 2021 at the Board of Directors meeting.

2.) Executive Summary: An Industry Perspective

HERO has a distinguished 25-year history as a leader in health promotion, population health and ultimately, overall health and well-being (HWB) for American employers and their employees. With the clear demand for health and well-being evidence and forward-thinking views, HERO expects to accelerate its leading-edge research, thought leadership and collaborative efforts. For example, we have extended our influence globally by expanding the HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard) outside of the U.S. in 2016. Our approach to building on our strengths and influential industry position is outlined in this five-year strategic plan.

While senior leaders have long recognized the importance of well-being and work, the global pandemic drove the point home emphatically. Employers were called upon to immediately prioritize the physical and mental health of employees, their safety and the impact of eminent disease risk on business operations. Managing employee stress, providing accurate information and managing rapidly changing health information became priorities for companies to succeed and thrive. The ineffectiveness of the national response has made it conspicuously clear that work, life, health, safety and well-being are inextricably linked. This has led many organizations to re-think how to re-design work and well-being initiatives as more personal, comprehensive and tangible for employees.

A Global Pandemic and Racial Inequities become high priorities for Companies

Dramatically, during 2020, our nation faced a watershed moment not only due to the global pandemic but because of social unrest and the growing support for the Black Lives Matter movement brought on by the killing of George Floyd and Breonna Taylor. These and other injustices committed by police officers sparked heightened attention to the significant disparities in our social system for Black, indigenous and people of color (BIPOC). This national crisis ignited discussions and demands by employees of their business leaders across America to look internally at and act on social and racial disparities within organizations. HERO has a statement of inclusion that is a part of this strategic plan, and the commitments in that statement are embedded in all aspects of our operating model. HERO has committed to inclusivity in all aspects of educational offerings. A summary is provided as part of the updated strategic plan later in this document.

This syndemic of racism and a global pandemic that has exacerbated health inequities has shuttered countless companies and forced others to enact mandatory work from home policies that, for many, are still ongoing. Millions of essential workers and their families remain at greater health and safety risks. These include healthcare workers, farmers, food suppliers, grocers and transportation workers, all with unique health and well-being concerns that employers are struggling to address. Many of these jobs are filled by BIPOC and low-wage workers who were already the most vulnerable for health, food insecurity and economic disparities.

The health and well-being of employees, the need for contemporary workers to have a meaningful employee experience and the impact businesses have on the environment has led American company leaders to reimagine the role businesses should play in society. While traditional views held that

businesses exist to maximize shareholder value, on August 19, 2019, the Business Roundtable presented a statement suggesting that companies should be stewards of the needs of people, the planet and their shareholders. The purpose of a corporation, they wrote, is to promote “An Economy that serves all Americans.”

WASHINGTON – Business Roundtable today announced the release of a new Statement on the Purpose of a Corporation signed by 181 CEOs who commit to lead their companies for the benefit of all stakeholders – customers, employees, suppliers, communities and shareholders.

<https://www.businessroundtable.org/business-roundtable-redefines-the-purpose-of-a-corporation-to-promote-an-economy-that-serves-all-americans>

The adoption of this broader vision for companies will be years in the making, nevertheless, the clear link of the very purpose of a corporation to the health and well-being of employees and communities ratifies HERO’s longstanding vision and values. What’s more, connecting the employer’s ability to thrive with employee well-being and environmental stewardship has important implications for HERO’s future focus and organization priorities. The Business Roundtable statement has influenced our strategic planning process. We have put a special focus on expanding how 1) we study and understand the drivers of health and well-being; and 2) equity and diversity become a critical part of how we operate, influence and organize as a non-profit provider of research and education.

As a result of these significant changes in 2020, the HERO Board of Directors has articulated the following attributes in the current and future needs for employer-sponsored health and well-being initiatives:

- Health and well-being continue to be a critical value to employers of all sizes.
- Health and well-being is a dynamic field and we intend to continue to be a voice of evidence and innovation to help guide informed decisions for health and well-being initiatives.
- As a trend spotter and trend setter, be courageous and bold in educating members and the profession about emerging strategies that influence health and well-being (HWB).
- Our strengths as an organization are our research, educational offerings, and our passionate membership which has continued to maintain a strong foundation of industry leaders from employers to strategic partners.
- Translate research findings to inform best practices approaches that health promotion practitioners can readily apply at the workplace.
- Provide training and education for the next generation of HWB leaders through mentorship programs, Think Tanks and our Forums.
- Methodically evaluate HWB connections to racial and health equity, social determinants of health, financial health, and all aspects of the dynamic workplace health and well-being profession.
- Provide leadership in research that assists employers and their senior leaders to demonstrate the value of investing in human capital and a healthy company culture.

3.) 2021 – 2026 Vision, Purpose, Values and Goals

Our five-year future vision, values and goals for HERO are listed below. We believe these encapsulate the important role we play in influencing and delivering value to our members and the health promotion profession. As businesses and societal issues evolve and change, we will adjust and adapt our priorities to assure we continue to deliver demonstrable value in health and well-being.

Vision statement:

All employers value health and well-being as a business imperative.

Purpose Statement:

HERO connects science and practice to demonstrate value of a health and well-being employer ecosystem.

Values:

- **Integrity:** we adhere to strict ethical standards and welcome constructive, unbiased and diverse dialogue
- **Science-based and practice-informed:** integrating pragmatic research and practice, we create actionable insights that drive business results
- **Forward thinking:** as trend spotters we are a catalyst of creative and generative innovation and substantive change
- **Deliver shared value:** to our stakeholder communities through education, collaborative partnerships, thought leadership and mentorship

Our Goals:

- **Deliver evidence-based program evaluation research** that includes broader socio-ecological systems that influence all aspects of health and well-being; i.e., SDOH, health equity and literacy, technology, racial equity, employee experience and corporate sustainability.
- **Help employers understand key metrics** that link improved employee and community health and well-being to improved business results.
- **Bring thought leaders together** to advance forward-thinking ideas and solutions that elevate the value of health and well-being at work, home and in the community
- **Actively pursue strategic initiatives, partnerships and collaborations** that help advance and influence of the role of employers in improving health and well-being

Delivering our Strategic Plan

We designed four key pillars to help frame how we deliver on our strategic plan and execute our values. Those four pillars are:

1.) Research

- **Deliver evidence-based program evaluation research** that includes broader socio-ecological systems that influence all aspects of health and well-being; i.e., SDOH, health equity and literacy, technology, racial equity, employee experience and corporate sustainability.

- **Help employers understand key metrics** that link improved employee and community health and well-being to improved business results.

2.) Thought leadership

- **Bring thought leaders together** to advance forward-thinking ideas and solutions that elevate the value of health and well-being at work, home and in the community.

3.) Convener/Partner

- **Actively pursue strategic initiatives, partnerships and collaborations** that help advance and influence of the role of employers in improving health and well-being.

4.) Operationalize

- **Create a growth mindset** that elevates our brand and delivers sustainable health and well-being value.

Each year we will create an annual operating plan approved by the Board of Directors to deliver on each of these pillars based on HERO's priorities, its membership and the industry to continue to advance the health and well-being of employers, their employees and their communities.

For historical reference, our prior vision, purpose, values and goals can be referenced in this link.

<https://hero-health.org/hero-five-year-strategic-plan-april-2019-refresh-2/>

HERO's Educational Inclusion Statement

The Health Enhancement Research Organization (HERO) provides think tanks, educational summits for medical directors and healthcare and university professionals, national webinars and an annual Forum. Together these programs reach over a thousand professionals every year who are working in corporate health promotion, health care and human resources. We consider that it is the credibility of our content, the trend setting nature of our curriculum, our rigorous approach to instructional design and, of course, the excellence of our faculty that has put us in the privileged position of being able to attract top talent to our events. With this privilege comes a heartfelt sense of responsibility to design educational offerings to be inclusive and relevant for those of different races, colors and creeds, and we believe our faculty needs to be representative of those we serve.

This inclusion statement is our promise that HERO will strive to be a national leader not only in the learning experiences we provide but in the way we provide experiences that emphasize acceptance, respect, and belongingness. We will fulfill this promise by embodying the following beliefs about the value of inclusion and diversity in every program we plan:

1. Ensuring that faculty recruitment represents the rich diversity of the organizations and communities we strive to improve/serve. This goes beyond non-discrimination by race, religion, age, or sexual orientation and is intended to make the recruitment of a diverse faculty a distinguishing feature of our program planning.
2. Expecting and planning for diversity of thought and respecting diverging views regarding the best ways to achieve health equity.
3. Inviting faculty and program participants to offer feedback on a program's success that includes items relating to their sense of feeling welcomed and supported.

4. Providing speakers written guidance on HERO's expectations about respect and inclusiveness and our aim to recognize and minimize micro-aggressions, tone policing and harmful stereotypes.
5. HERO will periodically review our statement on inclusion with HERO staff and Board.

We aim to exert leadership in professional education that is relevant to an ever-changing workforce and an ever-evolving demographic of organizational leaders, while also acknowledging that this diversity has been present for decades without proper recognition. Therefore, we believe that it is only through a diverse faculty that we can bring the diversity of knowledge and perspectives needed to affect breakthroughs in HERO's mission that all workplaces will advance the health and well-being of their employees, families, and communities.

Notice of Nondiscrimination Practices (Reviewed 3/30/21)

The promises and goals above are intended to reflect HERO's aspiration to provide leadership and serve as an exemplar committed to kindness and inclusion that is a noticeable and highly regarded attribute of our approach to educational program planning. It should be explicitly stated that HERO is also committed to compliance with all applicable Federal civil rights laws and does not discriminate on the basis of race, color, national origin, age, disability, gender and sexual orientation. (Here are [SHRM guidelines](#) for grievances and a harassment [complaint form](#).) Civil rights complaints can be filed with the U.S. Department of Health and Human Services, Office of Civil Rights: [Filing a civil rights complaint](#).

Additional examples of company's inclusion statements can be found here:

<https://hero-health.org/inclusion-statement-for-hero-education-3-30-21/>

4.) Strategic Road Map and Measurement Strategy

2021 Strategic Planning Initiatives:

Research:

- Identify evolving best practices in health and well-being amid variable work environments
 - Strategies to optimize multiple dimensions of health and well-being amid return to work
 - Assess employees' experience, engagement, well-being, and other outcomes in return to work
 - Examine how addressing SDOH through benefit design, additional programs and services, alignment of philanthropy and volunteerism to overall human capital/equity and sustainability initiatives and/or community investments improve key business outcomes
- Advance best practices in diversity, equity & inclusion / health equity
 - Identify best practices and common elements of successful DE&I initiatives
 - Examine the role of the employer and carrier/vendor partners in health equity initiatives

- Create an “equity index” for employers to examine how business practices and culture of inclusion improves health, well-being, engagement, while also contributing to health equity in the community
- Measurement
 - Identify best practices in mental health and existing mental health scorecards / measurement guides
 - Develop “individual” scorecard that assesses the impact of employer’s culture, policies, and practices on mental and emotional health, DE&I, and experience
 - Validate factor structure of the HERO Scorecard version 5
 - Replicate stock market performance study using latest methodology and V5 data
- Utilize a case study approach to highlight bright spots and inform narrative change
 - Case studies of successful employers to illustrate integration of mental health and SDOH and inform conceptual frameworks to guide future work
- Literature reviews (to inform research, programs, and policy)
 - Commentary on how best practices have changed and the impact on program cost and business outcomes
 - Cohort analysis of repeat completers of HERO Scorecard version 5

Thought Leadership:

- Identify key trends, agile translation of ideas and solutions and potential impacts of health and well-being; mental and emotional health, remote/WFH workforce, plan design, social determinants of health, redesigned work, manager role in culture and employee adaptation
- Bring thought leaders together on core issues and connect in unique and innovative ways
- Showcase leading edge employer ideas to advance next generation health and well-being initiatives; link with diversity, equity and inclusion (DEI), health, quality, safety, new time away from work policies, allyship, employee resource groups, etc.
- Provide evidence and best practices through applied solutions; case studies, demonstration projects, tool kits, white papers, and published research
- Deliberate consideration and recognition of the unique interests and needs of small to medium size employers. Identify new audiences and stakeholders to recognize the interconnectivity and evolving nature of the health and wellbeing landscape.
- Provide thought leadership on policy; proactively prepare for new regulations regarding workplace health and well-being
- Evaluate ways to create focus on key trending initiatives to promote HERO’s brand as a “go to” health and well-being thought leader; lead and participate in strategic key influencer forums that align with employer health and well-being values

Convener/Partner:

- Influence adjacent organizations, initiatives that help drive HWB
- Amplify HERO research and values through partnerships, collaborations and use of media platforms
- Use our influence in spheres where we gain the biggest value (e.g., employers)
- Actively pursue strategic initiatives that are new and influential (e.g., Aspen Institute, Consumer Goods Forum, Business Roundtable, US Surgeon General); Intentional effort to pursue different avenues of influence consistent with our values (Strategic partnerships like ERIC)

- Help showcase how to create resilient public health priorities; COVID is crisis of the year, opioids crisis of the decade, obesity crisis of the century. Employers should take short- and long-term view in strategic planning

Operations:

- Incorporate inclusion statement into HERO operational model
- Hold annual meeting to focus on annual strategic priorities and establish measurement approach
- Review governance structure and update accordingly
- Review membership strategy, set targets and update as needed
- Review Scorecard results annually and update approach and study questions
- Conduct annual membership/participant interest survey
- Survey membership on research priorities annually
- Develop brand recognition campaign and measure impact
- Search engine optimization strategy and approach
- Review needed resources and investments to align with mission and values

A summary of our draft roadmap is attached below. This will be finalized at our upcoming 4.20.2021 Board of Directors meeting.

