



## **MEETING PROCEEDINGS: A VIRTUAL EVENT**

**MARCH 3 & 4, 2022**

*Changing Boundaries, Changing Benefits: How employee well-being approaches are adapting to the new ways we work*

HERO Winter Think Tank convened as the world watched Russia's invasion of Ukraine. As bombs rained down and humanity scattered, searching for safety in a time of war, our Think Tank members took a moment to pause and reflect on these uncertain times. HERO shared resources with ways to help the Ukrainian people during this crisis and Think Tank members shared in turn, the ways their organizations were affected by this turmoil and ways they too were providing resources and aid to the area.

**From Karen Moseley, HERO President & CEO:**

As a military spouse familiar with the tearful goodbyes of deployments, I'm reminded of the words of G.K. Chesterton: "The true soldier fights not because he hates what is in front of him, but because he loves what is behind him." We're also hearing about companies—some of which are HERO members and represented here today--taking a stance by pulling back on Russia business, and others providing emergency support for their employees living in Ukraine.

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G.K. Chesterton

Turning our attention back now to our learning objectives for our Think Tank, the new pandemic-induced challenges employers are facing aren't as catastrophic as a war, but they are far reaching, and they do also relate to issues of freedom, autonomy, and self-determination. Our overriding question behind Winter Think Tank is whether the new ways we work will have positive or negative effects on well-being and what companies and wellness providers can do to mitigate those effects? We are pleased to present you with highlights from this faculty of top national experts and company leaders who helped us explore how hybrid work arrangements, flexible schedules and increased telework impact job satisfaction and life satisfaction.

A Northeastern University survey of more than 1000 executives' views on how the pandemic will affect working arrangements found that 62% are more likely to offer remote work. What's more, 52% indicated that "hiring employees who primarily work remotely will be central to their employee talent recruitment and strategy going forward." For front line workers, greater control over when and how long they work has also emerged as a byproduct of this unpredictable virus. For many, greater autonomy will feel nicely aligned with their preferences for greater control in how they perform their work. Others may feel more stressed by the loss of structure and direction provided in a traditional workplace setting. Still others may find that the benefits of working from home are offset by anxiety about work being omnipresent.

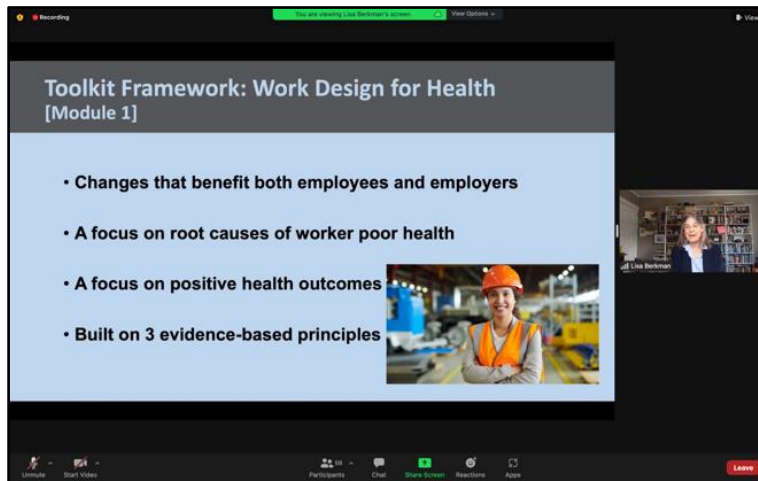
Successful leaders know that good decisions require good information. You can expect that this think tank was just the start of more studies and learning events from HERO that help us all answer questions about the relationships between the new ways we work and health, particularly mental health, and well-being.

You can find ways to assist the people of Ukraine [here](#).



## DAY 1: SPEAKERS & BREAKOUTS

### Workplace Re-design for Employee Well-being and the [Harvard Toolkit](#).

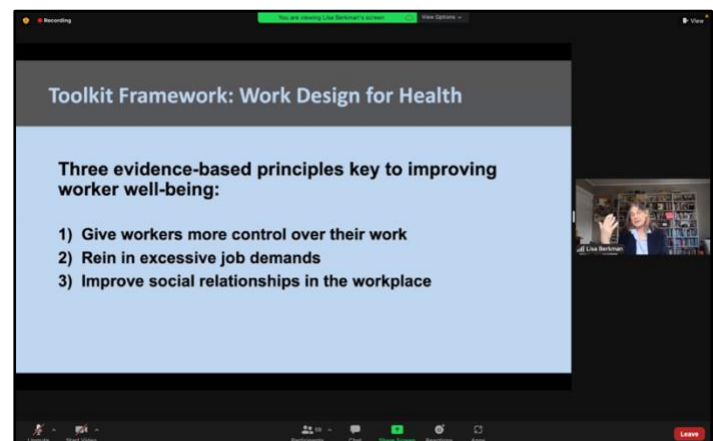


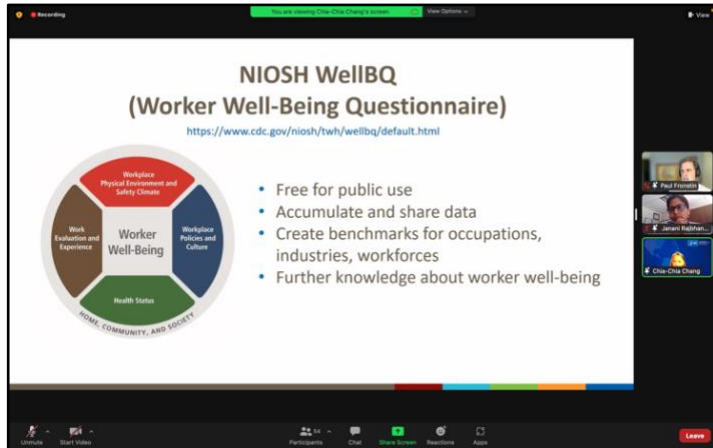
Lisa Berkman, PhD, Director of the Harvard Center for Population and Development Studies and Thomas D. Cabot Professor of Public Policy, Epidemiology, and Global Health and Population, Harvard T.H. Chan School of Public Health.

Dr. Berkman gave an engaging presentation on the workplace re-design

that organizations are currently undergoing as the workplace becomes our homes and hybrid remote locations, while the employee becomes more independent and desires autonomy over their responsibilities and schedule. Dr. Berkman stated that organizations should, “Change the workplace – not the worker,” and provided three (3) evidence-based principles:

1. Give workers more autonomy (how they do their job, schedule, voice/influence).
2. Rein in excessive job demands (increase staff, streamline work, cross-train).
3. Improve social relationships at work (support between coworkers and supervisors, sense of belonging, effective teamwork).





## Navigating the New Workplace Landscape: An Expert Panel

**Paul Fronstin, PhD**, Director of Health Research and Education Program, Employee Benefit Research Institute (EBRI)

**Chia-Chia Chang, MPH, MBA**, Coordinator for Partnership and New Opportunity Development for the office of Total Worker

Health at the National Institute for Occupational Safety and Health (NIOSH), CDC

**Janani Rajbhandari-Thapa, PhD**, Health Policy & Management Associate Professor, Director of Diversity, Equity & Inclusion, Director of Economic Evaluation Research Group, Director of Obesity & Weight Management Certificate, University of Georgia

This expert panel discussed Value Based Insurance Design or VBID, which allows more flexibility in healthcare plan designs before diving into the The Worker Well-Being Questionnaire or [NIOSH WellBQ](https://www.cdc.gov/niosh/twh/wellbq/default.html). This is a free tool that allows employers to measure worker well-being of their employees “as a holistic construct rather than simply “workplace” or “work-related” well-being,” according to the CDC website. The questionnaire covers five (5) domains as identified by NIOSH and the RAND Corporation in [Expanding the Paradigm of Occupational Safety and Health: A New Framework for Worker Well-Being](#)<sup>external icon</sup>:

1. Work Evaluation and Experience
2. Workplace Policies and Culture
3. Workplace Physical Environment and Safety Climate
4. Health Status
5. Home, Community, and Society

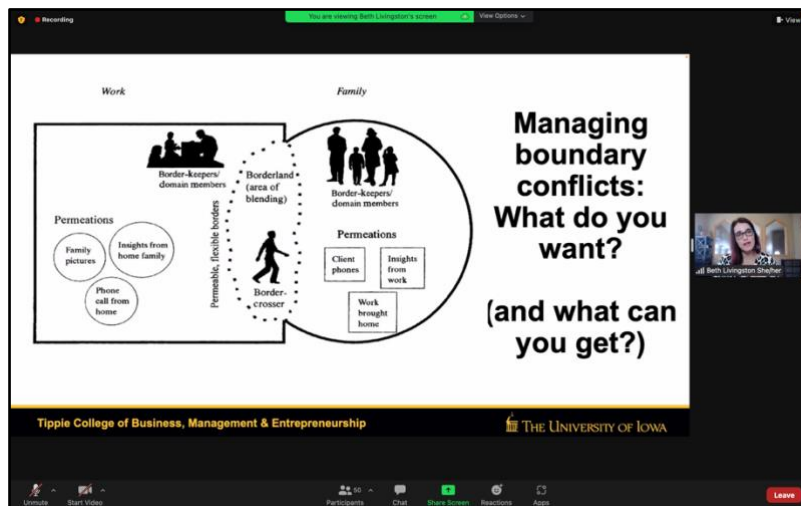
**Equipping and Supporting Boundary Keepers, Beth Livingston, PhD**, Assistant Professor of Management and Entrepreneurship, Tippie College of Business and Faculty Director of the Dore Emerging Women Leader’s Program, University of Iowa

Beth provided a presentation on the management of boundaries in the ever-evolving workplace as it relates to hybrid work, working from home and office space work. She shared research on the management of boundary conflicts, where life and work intersect. Beth discusses how language matters and why saying “work-life balance” may be out of balance with today’s employee’s priorities.



***“Someone may not have a balanced scale for home life vs. work life and that’s ok.”***

***-Beth Livingston, PhD***



Beth’s presentation touched on how to manage your own and other’s boundary expectations by:

- Using technology, such as email, to ensure boundaries are kept in place during vacation times or after-hours;

- Being a role-model for healthy behaviors;
- Understanding that individuals have different needs and behaviors when it comes to setting and maintaining boundaries for work and life;
- And asking your employees about their boundaries – and use this information to help by scheduling emails, using shared documents or other options that respect the boundaries of an employee.
- Lastly, Beth discussed how leaders should not project their own boundaries and needs on their employees. She expressed that is normal to have employees who mingle life and work together, even if that does not work for you as the manager, director, leader of that employee. This includes “checking assumptions” from the pre-pandemic world and old norms and looking to the future of work based on the new normal of hybrid and remote work.

In discussions following Beth’s presentation, Paul Terry, PhD, (HERO Senior Fellow) stated that “if we repeat autonomy, we need to get clear on accountability,” a sentiment that resonated with attendees as the conversation explored what boundaries and responsibilities looked like for employees in this new hybrid working world. A reactor panel convened with Beth after her presentation, consisting of Rachel Henke, PhD, and Gerardo Durand, MD, to discuss the boundaries and psychological safety within the workplace, before moving to discussions among small groups that allowed for open discussions among peers and experts.

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## DAY 2: SPEAKERS & BREAKOUTS

### WELCOME & HERO BOARD INTRODUCTIONS

From Karen Moseley, HERO President & CEO and HERO Board Chair, Joni Troester.

The first day of Think Tank led to deep discussions that created a great energy for day two. Karen introduced HERO's newly appointed Board Chair, Joni Troester. Joni took the time to welcome participants and introduced the newest members of the HERO Board of Directors. The 2022 Board elected Ryan Sledge, MPH, MBA, VP of Workforce Health & Safety at HCA

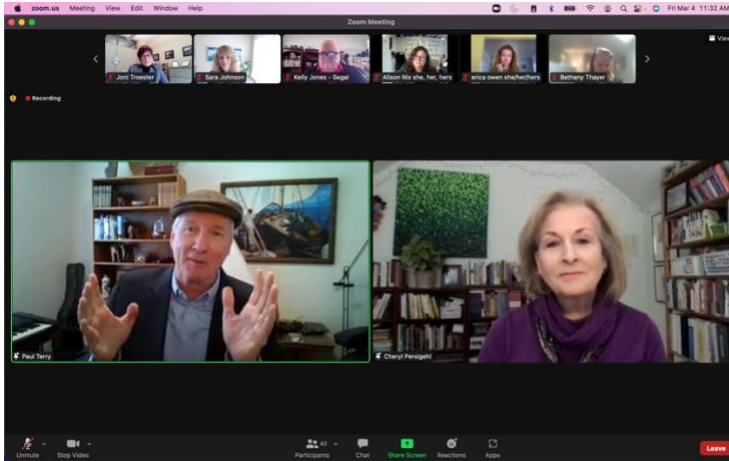


Healthcare, as the new HERO Treasurer; and directors, Jennifer Posa, PhD, MS, Global Head for Employee Mental Wellbeing & Workplace Effectiveness, Global Health Services at Johnson & Johnson; Krystal Sexton, PhD, Americas Regional Lead, Human Performance and Care at Shell Oil Company; and Steven Noeldner, PhD, MS, Partner & Senior Consultant, Total Health Management at Mercer.



# WHY DIFFICULT TIMES DEMAND DIFFICULT CONVERSATIONS

Cheryl Persiegehl, MBA, Organizational Effectiveness Consultant & Executive Coach



Cheryl discussed the “power of relationships” and how connections in the workplace can lead to deeper and more meaningful purpose in our work. She posed the thought that “We can’t always choose our reaction, we can choose our response.” And lead the participants into an activity that started with individual reflection and

quiet work before opening up the topic to a full discussion among small groups. Once small

groups worked through a worksheet, discussing a situation in which the participants have had to work through a workplace conflict, the groups convened together and Cheryl listened to group feedback and took questions. The activity covered TEA: Trigger, Emotion and Action, a way of addressing workplace conflict and concerns, in meaningful and supportive ways. Cheryl mused that this type of work is “80% personal.” She stated that in these situations, “the first to apologize is the bravest. The first to forgive is the strongest. The first to forget is the happiest.”



## HERO RESEARCH UPDATE

Mary Imboden, PhD, HERO Director of Research

Mary Imboden, PhD, spoke of HERO 2021 research and the HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard), updating HERO members on 2022 goals and progress. Mary also opened up the conversation to allow for HERO Member

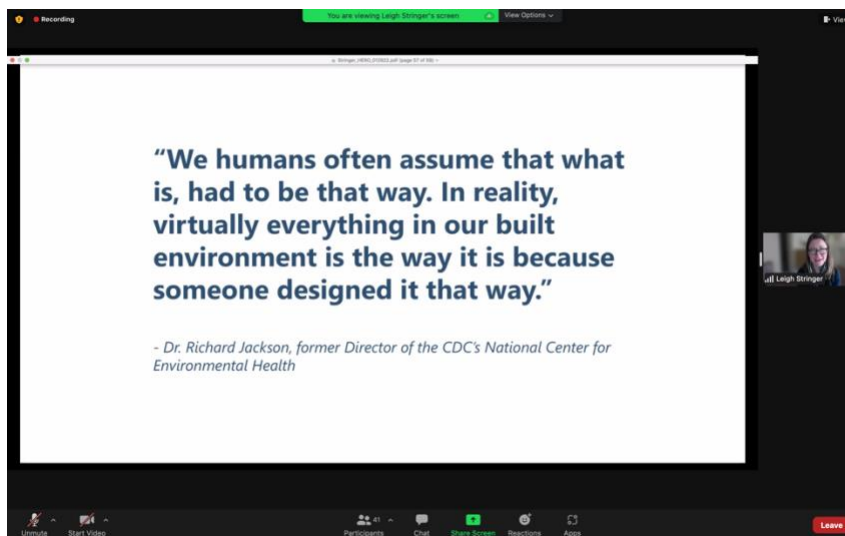




input and discussed the upcoming 2022 Research Agenda. Explorative conversations were had to garner collaborative research prospects and generate new ideas as HERO looks forward to what is yet to come in the world of workplace wellness and well-being. Participants took a break after the HERO Research overview and reconvened an hour later.

## **SUSTAINABLE STRATEGIES THAT BENEFIT EMPLOYEES, THE ENVIRONMENT, AND THE BOTTOM LINE**

Leigh Stringer, MBA, Managing Principal at EYP



Leigh Stringer brought a creative spin on the new ways we work as she addressed the physical space of a workplace and how the design and innovation of buildings, or the lack thereof, can effect and influence work. Her discussion on architecture of the

working world began with historical information on the way cities and buildings were formed and built in order to better the life of those dwelling and working within it.

She likened the new challenges of workplace safety during the Covid-19 pandemic, to that of the pandemic of the Spanish Influenza outbreak and Tuberculosis outbreaks that led to using outdoor facilities, using nature to heal and breath new life into buildings and places.

**“76% of workers who are working from home, want to continue to work from home”**

**-Leigh Stringer, MBA**

Leigh's key points of discussion were:

Workers deserve to have choice and flexibility. Autonomy matters in the workplace.

Shared spaces as opposed to owned spaces, allows for creativity and openness for employees.

IE: Less cubicles and offices, more shared opening seating and rooms for connection.

Technology and the metaverse are important in the new workplaces as we emerge from a pandemic and employees want safety protocols like air quality systems and reservation platforms for using conference rooms and other spaces.

Inclusion and transparency matter in the workplace, about expectations for working in the office space and what hybrid and remote options are available.

Lastly, Leigh covered how employers can use building as instruments of health – focusing on the need of the employee and what works best for their work and well-being, while functioning for the employer simultaneously.

Leigh's presentation was followed by Members Unplugged, a group activity where participants could chose from four (4) different topics that were open discussions on this list of topics:

- Healthcare Summit- vision & direction for the HERO 2022 Healthcare Summit – with Ryan Sledge, MPH, MBA (HERO Board of Directors), and Steven Doyle (need title).
- HERO Scorecard – Use and strategy planning with Mary Imboden, PhD (HERO), and Steven Noeldner, PhD, MS (HERO Board of Directors).
- Mental Health Standards for the Workplace – a discussion with Emily Wolfe, MSW, LCSW (HERO Director of Learning Experience) and Sara Johnson, PhD (HERO Resarch Fellow).
- Spirituality and Health -- What place for the Workplace? A conversation covering a preview of the Summer Think Tank topic with Karen Moseley (HERO President & CEO) and Paul Terry, PhD (HERO Senior Fellow).

# HERO COMMITTEES UPDATE

Emily Wolfe, MSW, LCSW, HERO Director of Learning Experience

Emily covered the topics of current HERO committees, and discussed the current projects and agendas for each group. The discussion allowed for HERO Member input and a call out for committee openings – those interested in joining a committee should contact Emily at [emily.wolfe@hero-health.org](mailto:emily.wolfe@hero-health.org)

# WHO NEEDS CITIES OR BUILDINGS? CHANGING WORK STYLES: REMOTE/VIRTUAL/HYBRID

A Reactor Panel with Tyler Amell, PhD, Chief Health & Strategy Officer at Medikeeper; Patti Rittling, PhD, Senior Associate at Mercer; and Brett Hautop, VP of Workplace at LinkedIn

This group covered the ever evolving topic of how the workplace is changing from the pandemic and what employers can do to embrace these changes. Patti discussed the need for PTO changes, and the pros/cons of unlimited PTO. Many organizations are beginning to explore this as a legitimate option but hesitate for reasons like policy usage and a decline in employees choosing to take PTO. All of the panelists discussed a renewed need for a paid parental leave and family leave policy in the US. The US is one of the only developed countries in the world without a paid leave law for new parents, family leave for caretaking or paid medical leave for other needs. In

addition, an emergency leave policy would assist employees as they continue to work while caring for aging parents, an ill child or spouse and other emergencies that could prevent an employee from being able to perform their jobs to their best ability.

**Lifestyle Spending Accounts: 101**

What is a Lifestyle Account?	How does it work?	How is it administered?	Pros/Cons
<ul style="list-style-type: none"><li>A 100% employer-funded benefit offering that helps employees with expenses for products and services not covered by traditional FSA and HSA spending accounts</li><li>General categories can include:<ul style="list-style-type: none"><li>Financial Health</li><li>Lifestyle Preferences</li><li>Emotional Health</li><li>Personal Development</li><li>Physical Health</li><li>Student Loans</li><li>Child/Elder Care</li></ul></li></ul>	<ul style="list-style-type: none"><li>An employer establishes the account by selecting what categories are covered and determining how much to fund – either with one lump sum or set amounts per category</li><li>The account funding is not subject to discrimination testing so can be offered to any segment of, or the entire population</li><li>Offered on a post-tax basis</li><li>Most commonly, offered side by side with other wellness, HRA and HSA plans with the median funding \$500 - \$1,000 per year</li><li>We have seen funding up to \$3k when other wellness programs are removed</li><li>Not intended to be COBRA-eligible</li></ul>	<ul style="list-style-type: none"><li>Accounts are typically administered by a vendor partner</li><li>Accounts are often co-administered with pre-tax spending accounts for employee experience simplification</li><li>Most vendors offer off-the-shelf solutions or can administer a custom benefit design</li><li>Vendors typically charge a PEPM fee for account administration or a fixed annual amount for use of platform and technology</li><li>Reimbursement can be provided via direct deposit and payroll. Employees submit receipts to be adjudicated against client-specific plan design</li></ul>	<ul style="list-style-type: none"><li>Pros<ul style="list-style-type: none"><li>Can be offered to all employees</li><li>Unspent money stays with the company if the employee leaves the company</li><li>Allows flexibility to customize and address employees' perceived needs</li><li>Spending guardrails can be put in place to define what is covered</li></ul></li><li>Cons<ul style="list-style-type: none"><li>The money is taxable to both the company and the employee, reducing the net financial value of money spent</li></ul></li></ul>

This is a new type of benefit offering and there is not yet prevalence information available, however we have seen a significant increase in interest in these accounts since 2020.

Zoom interface includes: Recording, You are viewing Patti Rittling's screen, View Gallery, Mary Imboden, Dr. Tyler Amell, Patti Rittling, Brett Hautop, and a bottom toolbar with icons for Mute, Start Video, Participants, Chat, Share Screen, Reactions, and Apps.



Brett discussed how LinkedIn has lifestyle spending accounts – a spin on the commonly known Health Spending Accounts. Lifestyle spending accounts allow for employees to have more equity in their health choices and provide funds for discretionary purchases such as gym memberships, exercise equipment or even a well-being day at a spa. These accounts could lead to higher employee satisfaction.

The reactor panel ended with the discussion on the importance of acknowledging holidays of all groups equally and making policy changes like including Juneteenth as a paid holiday, as well as offering options to persons of varying religious groups.

## **THINK TANK CONCLUSION**

The conversations from each day were filled with insights and created new questions and ideas among participants. The next Think Tank meeting for members only will be virtual on June 6 & 7, 2022, from 10 a.m. CT to 3:30 p.m. CT, each day. Summer Think Tank will cover the topic of ***Individual and Organizational Assets that Boost Belongingness: What Place for the Workplace in Supporting Social Connectedness, Spirituality/Faith, and Purpose?*** For more information, please visit: <https://hero-health.org/event/2022-summer-think-tank-meeting/>

