



HERO 2021

ANNUAL REPORT OF
ACCOMPLISHMENTS



DEAR HERO FAMILY AND FRIENDS,

On behalf of the HERO Board of Directors and our HERO members, we're proud to share our 2021 Annual Report of Accomplishments. No organization has been immune to the challenges caused by another year under the cloud of a pandemic, and HERO is no exception. We have certainly demonstrated organizational resilience. In keeping with proven strategies to reflect on one's progress, we'll look back and celebrate all that we have accomplished together in 2021, and look ahead to our 2022 goals.

Much of HERO's research and recognition as a respected leader in the field of workplace health and well-being can be attributed to the **HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard)**. We began 2021 with the release of Version 5, incorporating new research since the release of Version 4 in 2014. Employers can continue to confidently assess their health and well-being practices using the HERO Scorecard, which now includes additional questions around mental and emotional well-being; diversity, equity, and inclusion; social determinants of health; and community involvement. While COVID-19 has shown a spotlight on the connection between health and one's socio-ecological factors, it has also provided a world stage for employers rising to the challenge and taking care of their greatest asset – their workforce. Companies adopting these best practices will be able to adapt to the ever-changing nature of work and win the battle for talent. With more organizations completing the HERO Scorecard, we'll be adding new insights to this growing body of research under

the direction of **Dr. Mary Imboden, Director of Research**.

The HERO Board of Directors completed the organization's **2021-2026 strategic plan** with leadership support from **Anita Shaughnessy, Board Chair**, and **Shelly Wolff, Strategic Planning Committee Chair**. Refreshing the strategic plan is arguably their most important job as a Board. A fresh vision and purpose statement guide HERO as we continue to sustain health and well-being as a critical value to all employers while vetting emerging influential health and well-being topics. As a trend-setter and -spotter, we are committed to connecting research and practice in simple, applicable, and iterative ways while striving for the voice of both evidence and innovation. In June, HERO welcomed **Crystle Helderman, Director of Communications**, a new position on the HERO team intended to drive progress on connecting the research and helping influence evidence-based practice and innovation.

With the North Star strategy in place, the HERO research agenda prioritized four key areas in the next three to five years: equity, mental/emotional health, sustainability, and workplace performance. Our research leadership also changed in 2021, and we have benefited greatly from the expertise and experience of **Dr. Sara Johnson, Senior Research Fellow**, who joined the HERO team in January 2021.

We will proactively seek funders and grants to support the work and will also rely on HERO

members and committees with **Committee Project Manager Emily Wolfe's** guidance. For years, **HERO study committees** have supported the HERO research agenda with environmental scans and literature reviews, models and frameworks, case studies, and infographics.

As an organization focused on both research and education, HERO continued throughout 2021 to deliver thought-provoking learning events under **Senior Fellow Dr. Paul Terry's** leadership through webinars, members-only Think Tank meetings, and our annual Forum. While we all yearned to be with our HERO family and friends in person, we found technology-enabled ways to stay engaged, convene robust discussions, and showcase companies delivering best-in-class approaches for workplace health and well-being. **Project Coordinator Ariane Mistral** worked tirelessly behind the scenes to keep it all running smoothly. We could not have accomplished any of this without the generous support of our sponsors, alongside **Director of Marketing Pat Rohner**. Much of the learning content produced in 2021 was recorded and is available to members in the **Member Resource Center**. And one of our greatest hopes in 2022 is to see you in person again!

As 2021 came to a close, HERO received recognition as a **leader in workplace wellness** when the Global Wellness Summit presented the 2021 award to **Karen Moseley**. What an honor (and thrill) to end such a challenging year with the recognition that is so deserved by every single HERO member, committee contributor, and researcher! HERO's research and reputation have been built on decades of work by committed volunteers with the belief that investment (of time and dollars) in health and well-being produces healthy cultures and communities.

With gratitude to all our members, partners and supporters,

Karen Moseley, President & CEO

Anita Shaughnessy, Board Past Chair (2021 Board Chair), HERO; Health and Well-being Strategy & Planning Consultant, Wells Fargo



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/employee leadership

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RESEARCH

FROM MARY IMBODEN, PHD, HERO DIRECTOR OF RESEARCH



Given the growth in knowledge and research surrounding health and well-being best practices, a core team of subject matter experts identified the need to revise the HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© (HERO Scorecard). HERO Scorecard Version 5.0 (V5.0) was released in early 2021, with the goal of providing respondents with a more user-friendly and less burdensome assessment tool that is more representative of contemporary wellness initiatives and of the latest research on best practices. Questions were added to address new and emerging practices related to employer involvement in the community; mental and emotional well-being; social determinants of health; integration with diversity, equity, and inclusion; and a broader value proposition for investment in employee health and well-being. Section scoring was also changed to align with a factor analysis performed **in a recent study** that used HERO Scorecard data, which was published in the January 2020 issue of the *Journal of Occupational and Environmental Medicine*¹.

Organizations are encouraged to complete the **HERO Scorecard V5.0** to understand the latest expert recommendations for taking

health and well-being initiatives to the next level, identify new strategies for increasing health and well-being program performance and identify new ways to measure and evaluate the effectiveness of their health and well-being efforts. Further, by completing V5.0, organizations will be contributing to the development of new benchmarks that can help in understanding how an organization compares to similar employers. After one year, we have built up the database to begin offering benchmarks by organization size and select industry types. More benchmarks will become available as we attract more respondents in each category.

This past summer, HERO and Mercer identified the need to update the HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer© International Version (International Scorecard) to reflect the changes made to the US HERO Scorecard in V5.0. The International Scorecard Version 2.0 will be released in Q1 of 2022. We will begin benchmarking by country when we have at least 20 respondents for that specific country.

1. Imboden et al. Development and validity of a workplace health promotion best practices assessment. JOEM. 2020;62(1):18-24

COMMITTEES

FROM EMILY WOLFE, MSW, LCSW, HERO COMMITTEE PROJECT MANAGER





Healthy Workplaces Healthy Communities (HWHC):

The HWHC Committee is working to address not only the employer's role in advancing health equity and social determinants of health, but also the workplace policies and procedures that support improved health outcomes. In 2021, the Policies & Procedures Workgroup conducted an environmental scan of conference presentations, gray literature, and DEI resources to identify employer bright spots and examples of cross-departmental collaboration. The workgroup identified approximately 80+ resources addressing workplace health equity, and DEI informed policies and procedures. Given the magnitude of this space, and with the help of HWHC Committee member feedback, the workgroup is prioritizing these key areas:

DEI Categories:

- Race/Ethnicity/Language
- Sexual Orientation/Gender Expression
- (Dis)Ability

Policy/Practice:

- Talent management
- Wages & Compensation
- Work-life Integration/Leave
- Medical Benefits

The workgroup plans to publish an employer guidance report in Q2 2022 highlighting these key areas:

- What does it mean to have a DEI informed workplace policy and procedures?
- Why is it important?
- What's the impact on workforce equity?
- Where to begin, including foundational level guidance
- Employer examples, noting best practices and highlighting future opportunities
- Publicly available resources for employers





Workplace Mental Health & Well-Being (WMHWB):

The WMHWB Committee aims to build on our previous work found in the **Employee Mental Health & Well-Being: Emerging Best Practices and Case Study Examples** report, exploring ways employers are developing and measuring the success of workplace mental health and well-being (MHWB) strategies in the wake of the dual pandemics of racial injustice and COVID-19. The committee aims to identify employer bright spots, explore key workplace mental well-being metrics, and understand new solutions to WMHWB informed by diversity and inclusion. We have identified employers using key metrics from the **HERO Scorecard** along with employer case studies sourced from HERO industry partners, APA, and

the American Psychiatric Association Foundation's Center for Workplace Mental Health. Volunteers generated a curated list of employers ensuring a cross-section of industry type and size are represented for upcoming case story interviews. Employer interviews will begin in Q2 2022, and videos will be available to HERO members in the **Member Resource Center**.

In addition, the committee is working with the HERO Research Study Subcommittee to identify and analyze industry WMHWB tools that measure key areas including resilience, burnout, stress, psychosocial risks, and others, slated for Q3 2022 publication.



Employee Experience (EEx):

Significant evidence exists on the positive impact employee health and well-being (HWB) strategies can have on healthcare costs, workplace performance, and the overall culture of health within an organization. At the same time, there is increasing evidence that a positive employee experience (EEx), currently a growing area of focus for employers, may also achieve other important HR and business objectives. To better understand the EEx landscape, an employer survey was distributed in early 2021, exploring industry definitions and assumptions related to EEx and HWB. The survey collected qualitative data related to definitions, measurement,

strategic prioritization, and organizational approach.

Data was collected from 53 responding organizations representing a range of industries and business sizes. The Data Analysis Workgroup analyzed the survey results for a key highlights report to accompany a summary of findings scheduled for release in Q1 2022. The committee has identified employers for video interviews, to begin in February 2022 and continue through 2022. All EEx employer interview recordings will be made available to HERO members in the Member Resource Center.

A WORD FROM OUR FELLOWS



FROM PAUL TERRY, PHD, HERO SENIOR FELLOW

How can a profession lead a nation toward more inclusive and equitable access to well-being? When is it best to seek incremental improvements and when is it better to explore breakthrough possibilities? To what extent should science inform the practice of advancing workplace and community well-being or, vice versa, when must practice inform science? Is improving well-being best accomplished by one person at a time or, more audaciously, can we measurably forge a way toward wellness that moves the mental and physical resilience of an entire organization?

While these questions may seem impossibly idealistic, HERO professional development events in 2021 sought to answer them, nevertheless. Why take on grand learning goals with such far-reaching potential impact? Simply put, HERO exists to serve our members. Our members, representing many of the nation's premier private and public sector innovators, hold the power to transform human resources departments, wellness companies, and healthcare and academic centers to achieve collective well-being.

A word cloud of our learning events from 2021, and years prior, would reveal some recurrent themes guiding our educational objectives. Workplace well-being runs throughout our professional development curriculum. To achieve that end, we have hosted webinars, members-only Think Tanks, and our national Forum that have addressed trends in mental and psychological health and featured tools and techniques intended to increase thriving and reduce the incidence of struggling and suffering. We have continued to recruit experts in principles of social and cultural engagement, and we organized learning events that have examined social determinants of health and how to foster equity and inclusion in workplaces and communities. In support of providing the wherewithal to act on the teachings from the many scholars and successful practitioners we expose to our HERO members, our 2021 events prominently included tools relating to developing strategic plans, the use of metrics to inform program improvements, and the vital role of the HERO Scorecard in setting goals, monitoring progress and benchmarking program quality and outcomes.

Our annual reviews of our educational offerings afford us the chance to consider both where we've been and where we should be going next as it relates to stretching our professional knowledge and ability to answer the grand learning goals above. HERO committees, our Board of Directors and the HERO team are regular contributors to the development of our learning goals and, as much as we consider we've laid fertile ground for continuous professional improvement via the topics above, we also think there is plenty of ground left untilled. Our planning for 2022 learning events has us asking whether the power of spirituality and life purpose are under-represented in current well-being improvement initiatives. More specifically, research

FROM SARA S. JOHNSON, PHD, HERO SENIOR RESEARCH FELLOW

2021 was an exciting year for reimagining HERO’s Research Agenda! Building on the success of the comprehensive strategic planning process HERO recently completed, HERO sought input from a number of stakeholders to identify its key research priorities to advance our purpose of connecting science and practice to demonstrate the value of a health and well-being employer ecosystem.

Grounded by our core value of integrating pragmatic research and practice to create actionable insights that drive business results, the HERO research team sought input from HERO members at the 2021 Winter Think Tank. The ideas generated were then presented in a survey to the full HERO membership that requested a prioritization of top three research priorities. The input of HERO members was discussed within the research team and with HERO’s Research Advisory Group. The highest-ranking priorities, which overlapped with the most urgent needs of our time, are summarized by four key themes: **Equity, Sustainability, Mental and Emotional Health, and Workplace Performance**. Given the inextricable links between these themes, the depiction of the Research Agenda reflects their interconnectedness. The topics that emerged within each theme are described in detail below.

Sustainability	Equity	Workplace Performance	Mental & Emotional Health
Connect HWB to sustainable development goals	SDOH	Small & Mid-size Business	Post-pandemic mental health
Organization sustainability efforts	DE&I	Evolving workplace best practices	Burnout
Overlap of HWB & Climate Change	Access to care/condition management	Key metrics & reporting framework	Resiliency
Workplace & Community Interface on HWB	Technology/Digital Therapeutics	Impact of HWB on key business outcomes	Loneliness & Connectedness

Equity

HERO's commitment to advancing equity will involve research focused on how employers can implement policies and practices aimed at more comprehensively addressing social determinants of health; best practices in Diversity, Equity, and Inclusion (DEI); and the potential for integrating DEI with health and well-being initiatives. Other priority areas in this domain include ensuring equitable access to care and condition management, and how technology and evidence-based digital therapeutics can be leveraged to enable more equitable opportunities to access care.

Sustainability

Given the clear connection between climate change and well-being, HERO's research priorities include how organizations can connect health and well-being initiatives to **sustainable development goals**. HERO will also explore how organizations can collaborate with community partners to advance workforce health and well-being alongside broader organizational sustainability efforts that positively influence the enterprise, its people, and the surrounding environment. This priority area also includes the factors associated with the long-term sustainability of workforce health and well-being initiatives.

Mental and Emotional Health

In the context of the precipitous increase in rates of burnout and mental health concerns in the past 18-24 months, HERO will examine how to develop and measure successful health and well-being strategies that address workplace mental and emotional health. HERO research aims to focus on key and current workplace mental health topics, including resilience and social connectedness, as well as factors that may impact mental health (e.g., caregiving).

Workplace Performance

HERO will continue to advance the evidence base that demonstrates that a comprehensive approach to workforce health and well-being contributes to critical business performance objectives as well as individual employee performance. Research will also focus on understanding how health and well-being best practices are evolving (e.g., in hybrid or remote work environments) and can be optimally implemented by small and mid-size organizations.

As always, HERO strives to conduct collaborative and rigorous research that includes broader socio-ecological systems that influence all aspects of health and well-being. Equally important, our goal is to translate research findings and disseminate them in meaningful ways. To that end, we will ensure that the results of each research initiative are shared in multiple formats and channels to maximize accessibility and applicability.

We're eager to get to work and welcome your continued input and invitations to collaborate!



LOOKING FORWARD

FROM CRYSTLE HELDERMAN, MS, HERO DIRECTOR OF COMMUNICATIONS



In 2022, we are no longer *bouncing back*, but rather we are **Looking Forward**. HERO will continue to advance, striving to provide Leadership, Excellence, and Integrity, while furthering our Vision and Purpose. The **HERO Vision**, that *all employers value health and well-being as a business imperative*, aligns with the topics of our Think Tanks for 2022 as we look at new workplace boundaries for a hybrid workforce, where spiritual well-being fits in the workplace and standards for workplace-based mental health. **HERO's Purpose**, *connecting science and practice to demonstrate the value of a health and well-being employer ecosystem*, will be our guide as we identify the research and provide the tools that leaders and managers need to navigate the new ways the world works and lives in a post-pandemic world. The continued advancement of evidence around social determinants of health and DEI and perhaps the new discussions among employers regarding climate change and spiritual well-being in the workplace will serve as beacons for 2022, and we will forge a path to create a better workplace for employees around the world.

HERO will cover many topics in 2022 ranging from The New Ways We Work, to a Summer

Think Tank covering spiritual well-being, and what place does it, alongside faith and purpose, have in the workplace? HERO looks forward to once more gathering virtually, for **Winter Think Tank** March 3 & 4, 2022, to cover the topic of *Changing Boundaries, Changing Benefits: How Employee Well-being Approaches are Adapting to The New Ways We Work*, with expert speakers and deep discussion for our members. We will focus on the effectiveness of lifestyle medicine and population health principles. We hope to assess the role of all of the determinants of health: lifestyle, social issues, race and racism, class, and environment as we dive into *How the Choices We Have Influence the Choices We Make: Diversity, Inclusion, and the Integration of Lifestyle Medicine and Population Health Promotion* at our **HEROForum22** in Amelia Island, FL, September 19-23, 2022. 2022 will bring a fresh perspective to the health and well-being industry, and HERO plans to lead the charge as we look forward and demonstrate the value of health and well-being.

Here's to Looking Forward.

The HERO Team

