Best Practices for Participation and Engagement

William B. Baun, EPD, CWP, FAWHP
Wellness Officer, MD Anderson Cancer Center
President, National Wellness Institute
wbaun@mdanderson.org/ 713-745-6927

2013 IAWHP Global Symposium
Best Practice Guidance Collaborative
Worksite Wellness Value Proposition

“The level of corporate investment in workplace health programs will depend on the perceived value of these programs.” CDC Workplace HP Website (2013)

A value proposition is a promise of value to be delivered and a belief from the customer-client that value will be experienced.

- Wellness programs help control costs
  Goetzel, et. al. (2012) Ten modifiable risk factors are linked to more than 1/5 of employer-employee health care spending

- Wellness programs enhance retention & recruitment

- Wellness programs reduce absenteeism
  Baicker, et. al. (2010) Workplace wellness program can generate savings

- Wellness programs increase productivity
  Kirsten (2010) Making the link between health and productivity at the workplace – a global perspective

- Wellness programs improve employee morale and enhance organizational image
  World Economic Forum (2012) The workplace wellness alliance investing in a sustainable workforce
Participation & Engagement
Core Components Driving Program Success

Hero - Best Practice Scorecard
Version 3.1, March 2012
* Strategic planning
* Leadership engagement
* Program management
* Programs
* Engagement methods
* Measurement & evaluation
  Participation rates

Care Continuum Alliance - Outcome Guidelines Report (2011)
* Process measures (engagement, participation, #contacts, #interventions, #referrals)
* Behavioral Change / Modifiable risk factors (Self management, screening & prevention)
  * Productivity & quality of life
  * Appropriate utilization & medical costs

Parry (PHM, 2012) A pragmatic approach for employers to improve measurement in workforce HP
* Financial
  * Program participation
  * Biometric screening
  * Health risk utilization
  * Preventive care
  * Chronic conditions
  * Lost time/productivity
  * Employee engagement

CDC - Evaluation Framework (2013)
* Engage stakeholder
* Describe program
* Focus on evaluation design
  Participation data
* Gather credible evidence
* Justify conclusions
* Ensure use and share lessons learned

O Best Practice Scorecard – Version 3.1
March 2012
Understanding Participation & Engagement as Key Metrics

“Focus on the vital few, meaningful metrics; avoid drowning in irrelevant details.”

Bremer & McKibben (2011) Escape the Improvement Trap

Metrics Facilitate
- Evaluating how well you are doing
- Learning how much of something is okay
- Consistency which leads to sustainability
- Motivating to take action
- Comparing performance levels
- Obtaining feedback
- Understanding of perceived value
- Controlling how much of something needs to be done
Participation Metrics
It’s More Than Just Tracking Who Showed Up

Attendance
Utilization
Adherence

Participation / Penetration Rates
Participation Frequency
Participation Patterns

Recruitment
Registration / Enrollment
Satisfaction
Completion
Goal Achievement

Sustainability
  Weeks
  3 Months
  6 Months
  12 Months

Attrition Rates
Attrition Frequency
Attrition Patterns

Readiness to Change
Self-Efficacy
Self-Confidence

Who
Why

Merrill, Bowden, Aldana (2010) Factors associated with attrition and success
Dishman (2006) Support group, time – convenience, satisfaction, skill level, injury, motivation
Engagement
It’s More than Just Participation

Human Resource Perspective

**Gallup** engaged employees work with passion and feel a profound connection to their company. They drive innovation and move the organization forward.

**Aon Hewitt (2012)** the state of emotional and intellectual involvement that motivates employees to do their best work.

**Canadian HR Council (2012)** the commitment and energy employees bring to work, a key indicator of their involvement and dedication to the organization.

**Henry Albrecht (2011)** Employee engagement is the holy grail of well-being, health and productivity programs. Employers that have achieved real returns from wellness programs recognize the role of engagement – not just in health programs, but in the interconnected health, work, and personal factors we call life.

Words Used to Describe Engagement

- Commitment
- Going above and beyond
- Drive
- Energy, involvement and efficacy
- Passion and profound connection
- Positive attitude
- Presence, attention and absorption
- Active participation
- Striving and thriving
- Potential into performance
Engagement: The Key to Overall Well-being

Career Well-being – liking what you do each day

Social Well-being – having strong relationship and love in your life

Financial Well-being – effectively managing your economic life to reduce stress and increase security

Physical Well-being – having good health and enough energy to get things done on a daily basis

Community Well-being – the sense of engagement and involvement you have with where you live

Rath & Harter (2010) The Economics of Well-Being

Tony Schwartz
HBR Blog (2012)
what’s required now is something called sustainable engagement....that fully energizes employees by promoting their physical, emotional, social, mental and spiritual well-being that gives an added capacity for focus and a strong sense of purpose.
Engaged **participants** attend programs because they are **intent** on improving their health and are **excited** about contributing positive energy and productivity to their companies, families, and communities.

Terry & Anderson (2011) The role of incentives in improving engagement and outcomes in population health management: an evidenced-based perspective
Engaging - Motivating Employees To Act

O’Donnell (2005) Simple framework
- what works best
- Awareness
- Motivation
- Skills
- Opportunity

Anderson (2011) Promoting wellness engagement in the world of reform
- Active leadership
- Healthy workplace culture
- Clear, simple incentive design
- Ongoing communication
- Strategic use of health assessment data

Chenoweth (2011) SHRM promoting employee well-being
- Set measurable engagement goals
- Incentives
- Independent health / wellness professional (Vendor, onsite, mix)
- Supervisors adapting work schedule
**Best Practices in Engagement**

*Best practice organizations higher levels of engagement in HA and coaching*

- Vendor integration
- Biometric screening
- Population-based programs
- Multiple Modalities
- Dedicated onsite staff
- Management Support
- Comprehensive Communications
- Integrated Incentives
- Comprehensive Program

Terry, et. al. (2008) Association between nine quality components and superior worksite health management program results
Five Key Principles for Incorporating Incentives

• Make the reward and what the employee has to do to earn the reward, easy to understand and easy to communicate.
• Choose a reward that has perceived value by all or most employees.
• Make sure the effort or activity required to receive the reward is reasonable compared to the value of the reward.
• Test the program to make sure employees are unable to “beat the system” to get the reward without full program participation.
• Choose an incentive and an approach that can be sustained over time. Remember that it is easier to add to an incentive than reduce it over time.

“The key to ongoing successful incentives will be to implement them as part of the overall wellness package and use them in ways that make sense within a positive and healthy company culture.”

Terry & Anderson (2011) The role of incentives in improving engagement and outcomes in population health management: an evidenced-based perspective
<table>
<thead>
<tr>
<th>Types of Rewards being Offered by Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
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<tr>
<td>Gifts/Merchandise</td>
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<tr>
<td>Raffles/drawings</td>
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<tr>
<td>Cash</td>
</tr>
<tr>
<td>Health Ins. premium reductions</td>
</tr>
<tr>
<td>Reduced health copays</td>
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<tr>
<td>Vacation days/paid time off</td>
</tr>
<tr>
<td>Contribution to HAS/FSA</td>
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</tbody>
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Working Well: A global survey of health promotion and workplace wellness strategies November (2012)
# Types of Deterrents/ Penalties Offered by Region

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Africa Middle East</th>
<th>Asia</th>
<th>Australia NZ</th>
<th>Canada</th>
<th>Europe</th>
<th>Latin America</th>
<th>USA</th>
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</thead>
<tbody>
<tr>
<td>Mandatory participation</td>
<td>39%</td>
<td>75%</td>
<td>68%</td>
<td></td>
<td></td>
<td>42%</td>
<td>58%</td>
<td>17%</td>
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<tr>
<td>Health insurance premium increases</td>
<td>38%</td>
<td>25%</td>
<td>11%</td>
<td></td>
<td></td>
<td>17%</td>
<td>17%</td>
<td>62%</td>
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<tr>
<td>Benefit reduction</td>
<td>9%</td>
<td>13%</td>
<td>9%</td>
<td></td>
<td></td>
<td>8%</td>
<td>21%</td>
<td>6%</td>
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<tr>
<td>Increased health copayments</td>
<td>8%</td>
<td>13%</td>
<td>7%</td>
<td></td>
<td></td>
<td>0%</td>
<td>13%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Working Well: A global survey of health promotion and workplace wellness strategies November (2012)
Incentive Literature

**Madison, Volpp & Halpern (2011) JLME: The law, policy and ethics of employers’ use of financial incentives to improve health.**
Recruitment rates improve, consumer health incentives have a short-term impact, but find less evidence of long-term effects. Clear there are benefit, and potential to discriminate. Need for more systematic evaluation.

**Terry & Anderson (2011) The role of incentives in improving engagement and outcomes in population health management: an evidenced-based perspective**
When aligned with environmental and educational strategies, economic incentives have played an important role in changing attitudes and practices. Progressed based incentive strategy provides a safe, effective, participant centered and equitable approach.

**Volpp, et. al. (2011) NEJM: Redesigning employee health incentives – lessons from behavioral economics**
The effectiveness of outcome-based wellness incentives is uncertain, and their use raises concerns about distributional equity, but their use is gaining momentum because of the belief that they should work in healthcare as they do in other systems.

**Loewenstein, et. al. (2012) BMJ: Can behavioral economics make us healthier?**
Nudges certainly have their place, and an occasionally good shove can advance individual and social welfare considerably more. Behavior economics if use appropriately can confer great benefits, but is not a substitute for more fundamental polices dealing with our world healthcare crisis.
Communicating Results-Based Wellness Right

- **Connect the dots** – clearly explain how the wellness program is connected to the companies overall benefit strategy.

- **Make it clear, keep it simple** – some elements of the wellness program is medical jargon (biometric screening, health assessment) that can be daunting. You need to define the terms and repeat the concepts.

- **Focus on confidentiality and privacy** – health information is very personal and can elicit strong emotional responses. Take care to continually reassure employees that their privacy will be protected and kept confidential.

- **Plan for questions and concerns** – change involving personal health combined with privacy and confidentiality issues can be unsettling. User guides, tips sheets should anticipate and address all potential reactions.

- **Communicate, communicate** – communicate all year long, and enable a two-way dialog using feedback or questions to drive new content.

- **Keep it engaging!**

Benz (2011) SHRM: Getting results-based wellness right
Closing the Gaps

- Enabling employees with internal support, resources, and tools that must be created and continually nurtured.

- Creating an environment that energizes and promotes physical, emotional, and social well-being – you can feel the energy pulse in an organization.

Drivers of Sustainable Engagement

- Leadership
- Stress, balance, effectiveness
- Goals and objectives
- Supervisor, team support
- Organizational ownership, support

“Feelings of overload and burnout are the default emotions in organizations today. It is easy to fall into the victim mode. Individuals must invest their energy in what they have the power to influence and not what they can’t, and have the wisdom to know the difference.”

Tony Schwartz HBR Blog
### Employee Engagement & Enablement

#### Individual Performance

<table>
<thead>
<tr>
<th>Employee Enablement</th>
<th>Employee Engagement</th>
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<tbody>
<tr>
<td></td>
<td>Low</td>
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<tr>
<td></td>
<td>High</td>
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<tr>
<td></td>
<td>Low</td>
</tr>
</tbody>
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#### Enabling Factors
- Availability of resources
- Accessibility of services
- Supportive policies
- Multilevel leadership support

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Hennesy & Hicks (2009) JCB: Using wellness programs to create employee engagement
Building Your Way to a Culture of Engagement

**Imperatives** – “I must”, mandates that enforce accountability for specific behaviors or actions

**Infrastructure** – “I’m able to”, resources, services, and tools that enable and support change

**Incentives** – “I want to”, motivators that encourage greater responsibility and accountability

**Information** – “I understand”, elements that educate, promote, and build awareness

Blackwell (2011) Emerging engagement strategies for employee wellness
Creating a Culture of Engagement
Lessons from Gallup

Engagement is driven in a culture that values behaviors that support these perceptions:

- Continued satisfaction during change process
- Clear expectation
- Opportunity provided within environment
- Ongoing recognition for their effort
- Supportive caring environment
- Multiple avenues of encouragement
- Opportunity for feedback and coaching
- Progress tracking
- Ownership, responsibility, and accountability
- Learning environment supporting individuals / team commitments

Harter, et. al. (2009) Q12 Meta-analysis: the relationship between engagement at work and organizational outcomes
Creating a Culture of Engagement
Lessons from Dale Carnegie

The importance of people: “you must capture the heart of a supremely able man before his brain can do it’s best.”

Engagement is driven by:

• Relationships – we don’t do wellness alone, our social networks have significant influence

• Beliefs – our belief systems influence our motivation, intentions, and engagement

• Pride – is at the heart of positive employee engagement and performance

Do One Thing, or DOT, is an invitation to employees to think about their daily actions and pick one change they can make that will have a positive impact on themselves, the company, and their community. It breaks the scary “s” word (sustainability) down into simple actions.

**Five Effective Strategies:**

- Be authentic and invite innovation
- Highlight employee stories
- Make it matter by linking it to business goals and values
- Keep it simple and fun
- Emphasize the team collective impact

Anderson (2012) Five ways AT&T engages employees to do one thing
Limeade offers an online platform that encourages employees to adopt healthy habits through goal-setting, peer support and creative, reward-based challenges.

Five Rules of Engagement

1) Be Relevant – self interest drives behavior, so if you want employees to be engaged, hit them where they live.

2) Make it Social – human being are social animals, successful program take a “we’re all in this together” approach


4) Integrate, integrate, integrate – insist that all programs and vendors are integrated to make it easy to understand and become engaged.

5) Play it Safe – the new era of wellness is fraught with risk, data integrity, safety, security / regulatory compliance. Cover all the bases and ensure clear communications at every juncture to reassure people.
"What fits your busy schedule better, exercising 30 minutes a day or being dead 24 hours a day?"