Shared Values-Shared Results:™ Positive Organizational Health as a Win-Win Philosophy

Realizing the Promise and Competitive Advantage of a “Thriving, Healthy, High-Performing and Sustainable Workplace and Workforce”
Edington Associates, LLC

Agenda

Dee (30 minutes – slides 1-19)  From the beginning: 1975 to 2010
• 2009: Zero Trends: Health as a Serious Economic Strategy
  • Risk factors are related to costs
• 2016: Shared Values-Shared Results: Positive Organizational Health as a Win-Win Philosophy
  • Go beyond Low Risk
  • Awakening to Human and Organizational Potential
  • Creating Shared Values-Shared Results
  • Redefining Individual and Organizational Health

Jennifer (45 minutes – slides 20-38)
• Evolving Positive Organizational Health
• Measure and Communicate What Matters
• The Win-Win Philosophy

Jennifer and Dee (Final Words; slides 39-41)
Natural Flow of a Population by: Risks-Costs-Age

Annual Medical Costs

Age Range


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Natural Flow: by Risk Status

Average of three years between measures

Modified from Edington, AJHP. 15(5):341-349, 2001
The Learnings and Promise of Zero Trends

*Zero Trends: Health as a Serious Economic Strategy* (2009) required 30 years of complexity* to arrive at simplicity

**Business Case: Health as a Serious Economic and Business Strategy**
- Health risks are related to costs
- Change in costs follow change in risks
- The natural flow of individuals is to high-risk and high-costs
- Help the low-risk individuals stay low-risk
- Health risks travel in clusters

**The Solution: Integrate Health Status into the Company Culture**
- Leverage the organization to move health into the business model
- Engage in strategic, systematic, systemic and sustainable strategies
- Measure what matters to the organization and to the people

*based on UHMRC 30-years research 1978 through 2008: 800 articles and presentations*
In 2008 these Thought-Questions were a Game Changer for me

Think about “healthy” individuals:

• Are all low-risk individuals the same?
• What words would you use to describe the most outstanding of the low-risk people you know?

Think about “successful” companies:

• Are all workplaces the same?
• What words would you use to describe the best of the workplaces you know?

Positive Individual Health

Past and current

High Risk
Highest Cost

Medium Risk

Low Risk
Lower or No Risk
Lower Cost

Behavioral Change Model

For Individuals and Organizations

What Drives Negative Outliers

High Risk

Medium Risk

Low Risk

New Model

What Drives Positive Outliers

Go Beyond Low-Risk

Behavioral Change Model

Model for Positive Organizational Health as a Win-Win Philosophy

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Challenge for 2015-2025

How can we make today's positive outliers tomorrow's norm?

What if anything will we do differently?

New Knowledge Driving Future Trends

• The science behind thriving and positive outlook and behaviors
• New insights in mind-body and body-mind connections
• Forming good habits while replacing old habits
• Impact of context: Environment, Climate, Culture, Social Support
• Cultivating intrinsic motivation for individuals and Organizations
• Decision making, change, resilience, mindfulness, self-leaders, other
• New questions, methods, measures, metrics, what matters
• New communications methods
• The value of emphasizing strengths and successes
Redefining Success for Individuals

**We Imagine** flourishing people and flourishing organizations where...

- individuals arrive at work every day refreshed and with a positive attitude and purpose
- individuals engage in productive and meaningful work and are recognized for their contribution
- Individuals engage in design thinking to develop positive life skills, including personal development for success at work.
- individuals demonstrate high-energy, enthusiasm, respect, trust, and collaboration throughout the day
- individuals leave work energized to engage with their family and friends and contribute to the good of their community

Redefining Success for Organizations

**We imagine**... Flourishing Organizations and Flourishing Employees Where...

- Organizations communicate health as a major marker of wealth for individuals and for organizations
- Organizations communicate that health has a high value in their organizational philosophy and core business objectives
- Employees engage collaboratively in meaningful work in a creative and inspiring work environment, including career development
- Organizations and individuals communicate support, respect, value and challenges throughout the day
- They both communicate that shared values, results and action toward positive health impacts the success of the organization and the individual
Shared Values-Shared Results™

At its core, the Model is about shared values, trust, respect, meaningful work, results, and engagement. It is about committed, engaged, and visionary leadership. Most important, we believe that everyone is a leader and everyone plays a significant role in the organization.

Our Shared Vision:

Populations throughout the world live and work within a thriving, healthy, high performing and sustainable workplace and workforce.

Awakening to Human and Organizational Potential

- Bringing Health, Wellness, and Well-being to a higher level in the individual and in the organization
- Reaching towards Human and Organizational Potential
  - What is the current level of performance of the employees
  - What is the current level of performance of the organization
- Merging Organizational and Employee Positive Organizational Health into a Win-Win philosophy
- Realizing and Creating the promise and Competitive Advantage of a “Thriving, Healthy, High-Performing and Sustainable Workplace and Workforce”
Examples of Shared Values

**Individual Employees**
- Positive Individual Health
- Satisfying and meaningful work
- Voice of the employee and trusted
- Flexible work schedule
- Safe, quality and well-being working conditions

**Senior Level Leaders**
- Revenue and profitable
- Sustainable
- Safety, quality, and well-being working conditions
- Employee and customer satisfaction
- Good place to work

Examples of Shared Results

**Individual Employees**
- Positive Individual health
- Respect, trust, recognition
- Autonomy in my workspace
- Voice and opinion valued
- Good place to work

**Senior Level Leaders**
- Revenue and profitable
- Sustainable
- Positive Organizational Health
- Safety, quality, and well-being working conditions
- Employee and customer satisfaction

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Positive Organizational Health

Flourishing Workplace
Flourishing Families
Flourishing Communities

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Three Stages of the Win-Win Journey

Create Shared Values – Shared Results

Measure and Communicate What Matters!

Evolve Positive Organizational Health

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Stage 1: Create Shared Values and Share Results

Stage 2: Evolve Positive Organizational Health
What Can ORGANIZATIONS Do to Inspire Engaged and Passionate Leaders?

- Inspire engaged and passionate leaders
- Encourage positive leadership practices
- Enhance positive energy networks
- Foster collaboration
- Encourage “Design Thinkers”

What Can ORGANIZATIONS Do To Create a Healthier Environment and Culture?

Foster collaboration:
- Promote collegial connections.

Design health into the environment:
- Architect healthier workplace choices.
- Working environments that nurture our evolutionary roots
What Can EMPLOYEES Do To Create a Healthier Environment and Culture?

• Be part of the solution—Engage in design teams
• Find your element
• Redesign your job—Job crafting
• Curate your own personal culture—Personal choice architecture
• Create a healthier personal milieu

What Can ORGANIZATIONS Do to Create and Maintain Positive Individual Health?

Coaching for:
• Peer support or mentoring
• Family and household support
• Wellness leadership
• Self-leadership connecting people to organizational and community health and wellness resources
• Life skills
• Leader skills
Three Basic Human Needs

- **Competence** is about feeling capable and effective in our social interactions, and in our work and lives, and being able to express our capacities.
- **Relatedness** reflects our need for connection with others, for being cared for and caring for others - a sense of belonging.
- **Autonomy** refers to our need to feel that we have control over our behavior, to behave in ways that have value for us and that align with our personal values.

What Can ORGANIZATIONS Do to Create Conditions to Support Employee Motivation?

Create a need-supportive environment and culture

**Develop Competence**
- Development opportunities for all stakeholders
- Create alignment between employees’ skills, values, purpose
- Small wins—Keep it simple

**Foster Relatedness**
- Create environmental conditions that foster connections
- Encourage teamwork and positive connections
- Support, encourage group flow, and empower design teams

**Provide Autonomy Support**
- Engage employees in designing initiatives
- Allow autonomy over how work gets done
- Allow choice over path to health and well-being — Don’t force it—allow it
What Can EMPLOYEES Do to Cultivate Conditions for Positive Personal Motivation?

Intrapersonal conditions
• Identify personal purpose and vision (Why)
• Heighten awareness of the link between personal practices and
  o Energy (What)
  o Positive personal motivation (What)
• Practice self-leadership (How)
• Understand and nurture epiphanies (How)

Interpersonal conditions
  o Create supportive interpersonal connections (How)
  o Support others in their journeys (How)
What Can ORGANIZATIONS Do to Measure and Communicate What Matters?

Measure what matters to all stakeholders. Use a broader lens on what is measured.

- Strength of leadership support
- Environment, culture and climate
- Program process
- Relationships—engagement and support
- Shared values and Shared results

Ask better questions.
Beyond the question of “Does wellness work?” to “What approaches works for whom and why?”

Understand Context, Mechanisms, and Outcomes.

Engage EMPLOYEES in Measuring and Communicating What Matters

Use measurement that engages.

Represent all stakeholders in the design and execution of the ongoing evaluation process.

Incorporate qualitative methods:

- Experience sampling
- Organizational ethnography
- Focus groups
- Interviews
- Observation
Ask Better Questions

Traditional Questions:   Emerging Questions:

How can we reduce health risks and unhealthy behaviors in employees and reduce healthcare costs for companies?  
How can we help people thrive?  
How do we help healthy people stay healthy?  
How can we help create conditions for positive health outliers?  
What types of approaches work for whom, under what circumstances?

Create Better Solutions

Traditional Solution:   Emerging Solutions:

Worksite wellness programs focused on individuals with risk and disease  
Support thriving, health, and quality of life in the total population  
Create healthy and thriving workplace cultures and environments  
Embed our wellness programs within the organization’s overall business model  
Create positive organizational health  

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Use Better Measures and Metrics

**Traditional Metrics**
- Change in health risks
- Change in healthcare costs
- Return on investment (ROI) of wellness programs (primarily financial calculations)

**Emerging Metrics**
- Metrics of positive individual health and thriving
- Value of investment (VOI), including indirect financial results such as recruitment and retention, morale, loyalty, etc.
- Value of caring (VOC), including the tangible and intangible impact of strong positive relationships at work, at home, and in the community on the organization and its employees

Assess Environment, Culture and Climate

- **Shared Values**
  - Healthy Foundations
  - Flourishing Employees
  - Healthy Environment, Culture, and Relationships

- **Assess the Foundations**:
  - Pillars
  - Process and engagement
  - Programs and initiatives

- **Assess Relationships and Support**:
  - Workplace
  - Home, family, friends
  - Community

- **Assess Shared Values**:
  - Employee
  - Organization
Outline Your Expected Impacts

Shared Results

Measure What Matters to Employees
- Mental/Emotional: Self-efficacy, resilience, optimism
- Healthy Behaviors: Activity, nutrition, sleep, smoking
- Physical Health: Energy, vitality, biometrics, disease
- Spiritual: Life satisfaction and meaning
- Vocational/Intellectual: Work satisfaction and meaning
- Personal Financial: Security, safety, comfortable living
- Productivity: Absenteeism, retention
- Performance: Quality of service, performance
- Expenditures: Appropriate service utilization
- Revenue: Quality of products, reputation, long-term company viability

Measure What Matters to Organizations

Shorter-Term*  Moderate-Term*  Longer-Term

Example Comprehensive Evaluation Framework

Shared Values
- Healthy Foundations
- Flourishing Employees
- Healthy Environment, Culture, and Relationships
- Workplace
- Home and Family
- Environment and Community

Assess the Foundations:
- Attitudes
- Process and engagement
- Programs and initiatives

Assess Relationships and Support:
- Workplace
- Home, family, friends
- Community

Assess Shared Values:
- Employee
- Organization

Assess Shared Results:
- Employee
- Organization

Measure What Matters to Employees
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Measure What Matters to Organizations

Shorter-Term  Moderate-Term  Longer-Term
Examples Demonstrating the Value of Caring

- Annual Financial Reports followed by Annual People Reports
  - People related Recruitment and Retention
  - People awards and promotions
  - On-boarding topics
  - Exit interviews
- Business and Life-Skills Development programs for people
- Self-reported data, group discussion
- Financial results + people results = win-win
- Voice of the Employee, voice of management = win-win
- Shared Values, Shared Results = Shared purpose, mission, vision
- Revenue and profit sharing
- Better questions, data, analyses = new information and knowledge
- New knowledge = New definition of health
- A new path to success for individuals and the organization

Win-Win Philosophy

...organizations win when employees win...

employees win when organizations win...

Build belief and commitment within the organization that employees are the organization’s most valuable resource.

Build belief and commitment among employees that the organization is the best possible place to work.

Recognition that everything that happens in the organization impacts the well-being of the organization and the people.

A Win-Win Philosophy
Thank you for your attention

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