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Recent industry surveys indicate that a majority of employers are offering health and well-being (HWB) programs to their employees,^{1,2} but the reasons for offering them have changed over time. While a desire to improve employee health and contain rising health-care costs remain important, employers increasingly recognize a broader value proposition for investing in workforce HWB. A 2019 survey found employers are more likely to seek outcomes such as improved productivity and employee morale as well as reductions in injury rates and turnover.³ Demonstrating how workplace HWB initiatives are linked to such outcomes is challenging. As consultants, researchers, and practitioners working in the workplace wellness field for decades, we've often observed organizations that are benefits and data rich but information poor. Even when organizations invest in data warehouses and have access to sophisticated real-time reporting platforms, they struggle to organize the data into meaningful narratives that convey the value yielded by their investment.

In 2018, Health Enhancement Research Organization (HERO) convened a large group of subject matter experts, employers, industry vendor suppliers, consultants, and practitioners to discuss how to approach measurement, evaluation, reporting, and dashboard development within their organization.⁴ A key point raised by several subject matter panelists was the need to identify who will be using the information that is shared and for what purpose. Additionally, the observation was made that there is a tremendous amount of time and energy invested in the development of client-specific dashboards and that a standardized approach and metrics would be of benefit to all involved. Therefore, the convening launched an effort focused on providing guidance for employers on development of a Value Demonstration Dashboard that informs decision-making regarding ongoing investments in workforce HWB. This article aims to share this guidance, with a focus on steps for development and identification of metrics that will be most meaningful for performance insight and informed decision-

making by business leaders. But first, it's important to clarify what we mean by a Value Demonstration Dashboard.

What Is a Value Demonstration Dashboard?

There is no consensus point of view on what it means to have a dashboard. When some organizations talk about having a dashboard, they are referring to an interactive data and reporting platform that allows users to access summary metrics and drill down into the details to better understand subgroup comparisons or relationships between metrics. For others, a dashboard represents a visual display of many different metrics that are organized on a page or a few pages to tell a story about how the metrics are related to one another. For the purposes of this article, we focus on the latter approach. A Value Demonstration Dashboard represents a visual summary of key metrics that link investments in the HWB initiative to a demonstration of business value. Ideally, the metrics are displayed in a way that helps business leaders quickly understand how one metric is related to the others, and more importantly, how the metrics link to broader organizational objectives. The dashboard should be easy to absorb and interpret. In a concise manner, the dashboard data should be

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able to identify and support key messages about the value the organization is realizing as a result of its investment in workforce HWB.

One helpful metaphor for thinking about a dashboard is what you might see on your vehicle's dashboard. A series of gauges, statistics, and visual indicators help you understand the performance of your vehicle. It helps you understand if you need more fuel, a service repair, the efficiency of operation, and how many miles have been logged over time. In newer vehicles, the driver is able to scroll through many different displays that organize related metrics into snapshot views. The driver can quickly identify if action is needed to optimize use of the vehicle. Like a vehicle dashboard, the Value Demonstration Dashboard should include metrics that change over time and indicate performance and potential action needed. Whether your Value Demonstration Dashboard is organized as a single view or into a series of several views of related metrics, the key is to select only the metrics that are most important to the executive business leader and those relevant to the dashboard's purpose. And, like a vehicle dashboard that requires special knowledge about what certain indicators mean, the HWB dashboard requires skilled HWB experts to provide strategy, interpretation, and recommendations based on dashboard metrics. Different stakeholders within an organization might be interested in different metrics and may be more focused on operational process improvements than on how the initiative yields business value. In such cases, it may be necessary to create different dashboards to meet the needs of stakeholders.

Checklist for Development of a Value Demonstration Dashboard

Health and well-being dashboards take time to develop. They are living documents that should evolve over time as organizational objectives change and the HWB initiative matures. The following actions are offered as a starting point for organizations to build upon.

- *Identify key stakeholders* (senior business leaders) from across the organization and ask them what metrics are most important to them. Listen for why workforce HWB is of interest, what information is useful for helping them to decide when to take action to start, stop, or continue supporting a particular investment. Ask probing questions to get to specific details about expected goals or requirements for an investment to be considered worthwhile. You may also want to reference the written Strategic Plan for the HWB initiative (if it exists) to identify the specific goals and objectives the organization hoped to influence when it implemented the HWB initiative.
- *Identify other stakeholders* (eg, functional or departmental leader) and get their input on data availability and feasibility. Consider who has access to and oversight of key data, who has subject matter expertise about how to accurately use and interpret specific metrics, and who has technical skills to display data in ways that are meaningful and easy to understand. This step includes identifying which stakeholders might support ongoing implementation of specific metrics on the dashboard and who might contribute to creation of the dashboard itself. It is also critical to understand which metrics have been subjected to significant quality assurance checks and that stakeholders view as reliable and valid.
- *Develop a visual logic model* for how you believe the metrics are related to one another and how they connect HWB to broader organizational goals. The model should convey assumptions about what influences the metrics to change and consider which ones represent leading versus lagging indicators. The HERO-PHA Program Measurement and Evaluation

Guide⁵ provides a simple logic model and identifies potential leading and lagging indicators.

- *Identify and organize data sources* that help stakeholders understand the underlying primary source data informing each metric as well as secondary or tertiary data suppliers that influence the primary source data. Consider the data you will need, identify the ease of obtaining the data, the level of detail that will be available, and associated data use rights. These details may influence how frequently a metric can be updated on the dashboard and help stakeholders understand the level of resources needed to include it.
- *Create a prototype dashboard* before investing heavily in data collection or analysis. Get feedback on what is most meaningful. Ask stakeholders to consider how they will use the information represented on the prototype dashboard and if there is information missing that would guide decision-making.
- *Start simply* with a core set of metrics and evolve it over time as more data becomes available and as there is an increased understanding of influential drivers and relationships between metrics. Be willing to sunset metrics over time as they stabilize to make room for new metrics that become important.
- *Start with metrics you currently have available.* Establish a baseline and then develop a strategy for ongoing measurement to track time over time changes. A 2017 study by the Integrated Benefits Institute identified the measures most readily available to employers across a variety of industries.⁶
- *Identify new metrics* and data collection strategies that can be added to the dashboard as data become available.
- *Add indicators of goals or targets* as well as benchmark comparisons. Consider referencing industry benchmarks or vendor book of business comparisons as well as historical trends.
- *Consider subgroup comparisons* of interest (business units, geographic locations, employee demographics).
- *Add interpretive remarks* or indicators to help stakeholders identify key opportunities and actionable insights from the data. You can also get creative by using icons and different colors to convey meaning.
- *Schedule periodic review meetings with data experts* most familiar with the source data and calculations used in dashboard metrics to confirm data are being represented accurately and interpreted correctly. Investigate any numbers that look unusual or do not seem to align with other metrics on the dashboard. Make sure all stakeholders understand the source of the data underlying the metrics and what conclusions can be confidently drawn from the metrics.

Selecting the Right Dashboard Metrics

There are many different types of metrics that may be used to assess the value of a comprehensive HWB initiative, and organizations have different reasons for investing in workforce HWB. Therefore, it's critical for each organization to select the right metrics to serve its needs based on available resources and data as well as broader organizational objectives which may align with the HWB strategy. The following criteria should be applied when selecting the right metrics for your dashboard. Figure 1 lists a menu of potential metrics to consider. Additional guidance on selection of measures is provided elsewhere.⁷⁻⁹

Identify metrics that are

- directly and/or indirectly related to workforce HWB;
- sensitive to annual or semiannual change;
- helpful for guiding decision-making or identifying actionable strategies to enhance value;

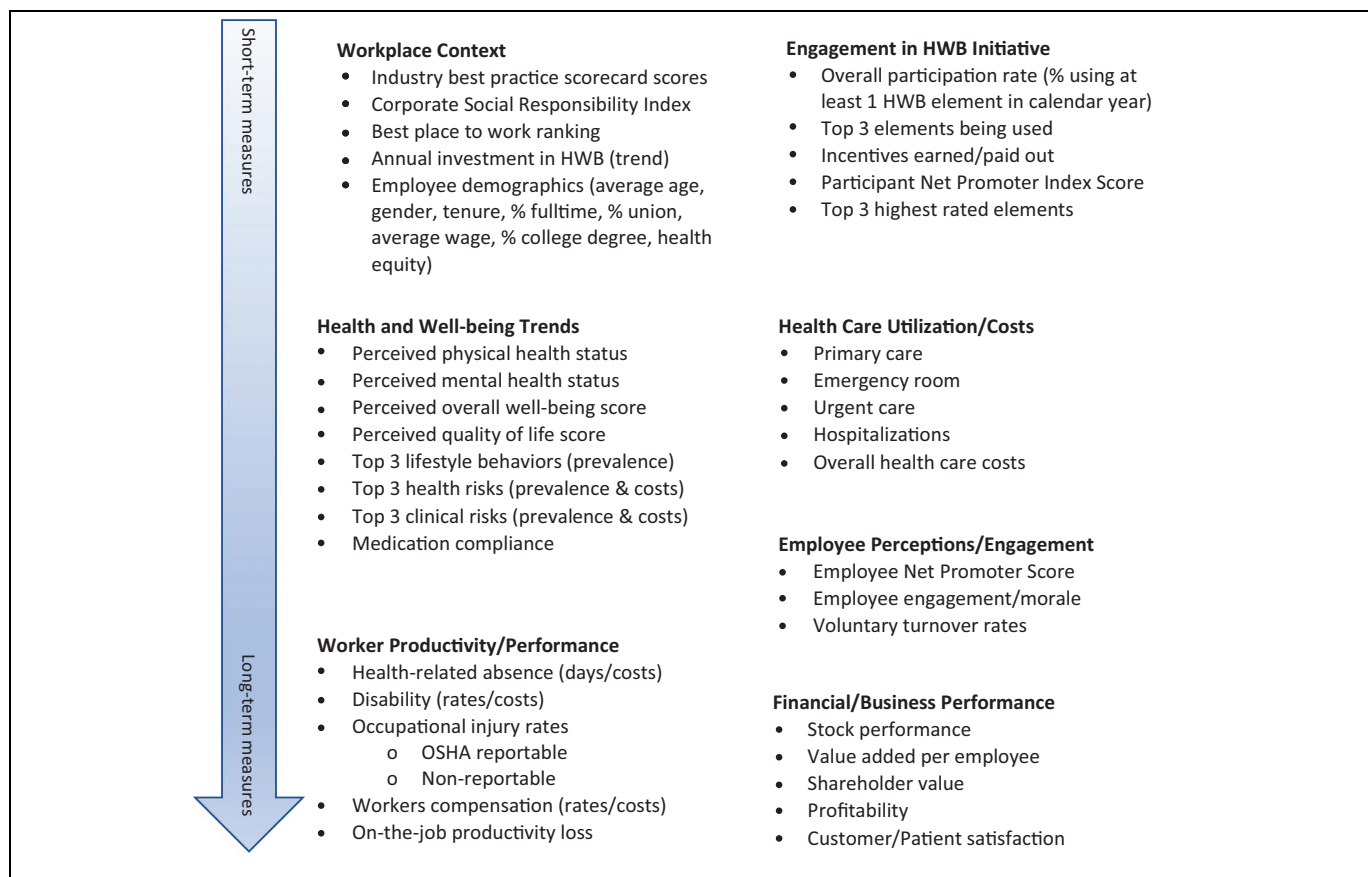


Figure 1. Recommended Metrics for Employer Value Demonstration Dashboards.
Abbreviation: HWB, health and well-being.

- feasible for the organization to measure and update over time;
- well validated and drawn from databases or reports subjected to trusted quality assurance procedures;
- associated with benchmarks for comparative purposes; and
- easy to interpret and understand.

One of the most challenging aspects of creating a Value Demonstration Dashboard is identifying the specific ways to visually display each metric and their relationship to one another. Some suggestions for layout of a dashboard are provided below.

Structure–Process–Outcomes Approach

One way to approach a dashboard is to organize metrics according to a Structure–Process–Outcomes framework.¹⁰ Metrics related to the *structure* of the HWB initiative assess the status of programs, policies, and organizational support for HWB. Such metrics are helpful to set the context for the dashboard, conveying the level of organizational investment and commitment to HWB. It can also monitor progress toward improvement of policy, organizational, and built environment supports for HWB. Metrics related to *processes* assess the extent to which the HWB initiative is being implemented as intended. In particular, it focuses on end-user utilization rates, satisfaction, and initial changes in attitudes or perceptions about the importance of HWB within the organization. These metrics are short-term indicators that must be met in order to produce desired intermediate- and long-term metrics. Metrics related to *outcomes* assess the impact the programs and

elements within the broader initiative are yielding, including health improvement, risk reduction, clinical outcomes, disease incidence, injury rates, reductions in health-care utilization and cost, absenteeism/presenteeism, disability rates, employee engagement, and other business results influenced directly or indirectly by the HWB initiative.

Logic Model Orientation

A logic model documents your understanding of the relationships that exist between the investments you make to operate your program and the changes or results that you intend to achieve over time.¹¹ While a complete logic model depicts specific resource investments and activities associated with implementing your program or initiative, the Value Demonstration Dashboard may draw just from the portion of the model that documents which results you expect to occur in the short, intermediate, and long term. Using this approach, you could start by identifying the outcomes that you expect to be able to measure in the first year of the initiative (eg, utilization and enduser perceptions of services) and orient them first on the dashboard and those you expect to emerge later in time (eg, financial impact) further along on the dashboard. The long-term measures may be slower to change and harder to measure so initial views of the dashboard may represent baseline measurement of those metrics.

Prioritization of Key Metrics

A third way to arrange the position of metrics on your dashboard is based on the prioritization of the metrics established during stakeholder

conversations about metrics that matter. The highest priority metric may be one related to a key business performance indicator that the entire organization is held accountable to achieve. The highest priority metric might be positioned in a central visual location on the dashboard, with related metrics positioned around it. Metrics which are directly related can be positioned most proximal to the central key metric while indirectly related metrics might be positioned in the outer periphery and linked to the more proximal metrics to indicate how their influence is realized.

Conclusion

Value Demonstration Dashboards represent one of many different dashboards that might be created to serve specific stakeholder needs for data-driven decision-making. Members at the executive leadership level of an organization want to know if there is value returned from an investment they are making with respect to their employee HWB initiative. Executive leaders are likely to be interested in business performance and financial impact metrics, but it is important to demonstrate how leading process indicators such as program utilization and satisfaction rates as well as health outcomes influence these metrics. The Value Demonstration Dashboard organizes the meaningful metrics into a narrative about how the metrics are related to one another and link the HWB initiative to broader organizational goals.

Other important stakeholders in an organization include HWB program managers, as they are the ones accountable for running the day-to-day operations of the various programs. While they may also be interested in demonstrating a measurable value on investment, their main interest may lie with understanding how different parts of the program are being utilized, what participants are most/least satisfied with, and how to ensure programs are doing what they were designed to do.

Before one begins to select the metrics and arrange them visually in a dashboard, it is important to clarify who is using the dashboard, how the information will be used, and how frequently it will be updated. This article provides some initial guidance for employers seeking to create a dashboard for executive level leaders that conveys how investing in workforce HWB is returning value or desired outcomes to the organization.

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