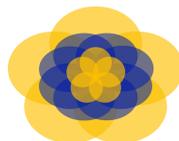


SHARED VALUES SHARED RESULTS

Positive Organizational Health
as a Win-Win Philosophy

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Introduction

Knowing is not enough; we must apply.

Willing is not enough; we must do.

—Goethe

Why This Book?

It's time to create realistic solutions to maintain high levels of health, performance, and thriving in organizations, individuals, families, and communities.

Being fully healthy is about much more than our physical attributes. Societies across the globe are reexamining what it means to be healthy and exploring more effective ways to support high levels of health and sustainable high performance. There is a growing awareness of the inseparable connection between mind, body, and spirit. The impact of our attitudes, work environment, climate, and culture, and the influence of our families, friends, and communities is also becoming clearer.

Well-implemented wellness and well-being programs can help the motivated employees who actively participate and work to lower risks and improve their health. However, we have seen only marginal reductions in risks and disease in the total population. The earliest wellness initiatives emphasized a multidimensional, whole-person approach to improving health. However, most corporate wellness programs over the past three decades have focused on helping individual employees reduce health risks to reduce healthcare costs. Until recently, very little attention has been given to the ways that organizational systems influence employee health or, more important, how improving organizational environments and cultures can better support healthy and thriving employees.

You can't put a recently changed person back into the environment from which he or she came and expect to maintain the change.

To better understand how wellness initiatives can more positively impact employee health and performance, we have examined the health-related effects of the complex organizational systems where people work and live. We knew that to support healthy employees, we needed an approach that would encourage organizations to modify their health-related environments, cultures, and climates. At the end of the day, no matter how good an organization's wellness

program, employees cannot realize their fullest potential health in an unhealthy workplace or in unhealthy families and communities.

When I became CEO of Steelcase, I had a strong inkling that what was true for me personally was also true in a larger context: that the well-being of individuals and the well-being of the organization they work for are inseparable. The better off employees are in terms of their personal well-being, the better off the company can be in terms of fiscal fitness, agility, and capabilities for innovation and growth.

By personal well-being, I mean the “whole” person at work—mind, body and soul—and I realized that the physical workplace could be a powerful agent in providing an environment in which people can thrive, which would in turn allow us to build the kind of resilient and agile organization we wanted to be.

*Jim Hackett
Former CEO, Steelcase, Inc.*

This realization led to the 2009 book *Zero Trends: Health as a Serious Economic Strategy*. *Zero Trends* outlines five fundamental pillars that provide the foundation for evolving more positive environments, cultures, and climates for employee health and well-being, and strengthening workplace wellness initiatives. In this book, we have built upon those pillars in the following ways:

Zero Trends	Win-Win Philosophy
Pillar 1: Senior Leadership	Pillar 1: Engaged and Committed Leadership
Pillar 2: Operations Leadership	Pillar 2: Positive Environment, Culture, and Climate
Pillar 3: Self-Leadership	Pillar 3: Self-Leadership and Positive Individual Health
Pillar 4: Rewards and Recognition	Pillar 4: Positive Personal Motivation
Pillar 5: Quality Assurance	Pillar 5: Measure and Communicate What Matters

As in *Zero Trends*, the pillars still emphasize the importance of strong leadership support for employee and organizational health initiatives (pillar 1). Thriving workplace environments and cultures are also imperative (pillar 2), as are resources, opportunities, and practices that support and develop employee self-leaders (pillars 3 and 4), and meaningful measures and feedback about progress (pillar 5).

In this book, we describe advances in research findings, in our thinking, and in our practices for each of these pillars. We also highlight their place in a larger strategic process for evolving thriving

workplaces and workforces. With *Zero Trends*, we focused primarily on the “why” and “what” of the pillar concepts. Here we include many ideas for “how” you can strengthen the pillars in your organization.

There is no singular solution or product that solves our problems. What we are trying to change and/or solve is much too complex for any one solution. We must be open to working from ground zero to build a better organization with a common vision that drives all organizational policies, projects, and programs toward a common objective of improved health and productivity.

*Brian Passon, MS
President, ARCH Health and Productivity, ArchHP.com*

Who Is This Book For?

At its core, this book is about leadership. It is about committed, engaged, and visionary leadership. Most important, we believe that everyone is a leader and can play a significant role in his or her organization.

Because of the fundamentally complex and social nature of health, our solutions must be social, collaborative and creative. Therefore, we have written this book for multiple audiences that represent all parts of the organization. Senior executives, leaders in management, and labor union leadership are all core to the kind of evolution it will take to make a sustainable difference in the health and well-being of your workplace and employee populations.

We also believe that all members of organizations are leaders in their own right and are all valuable contributors to high levels of health and thriving of employees and organizations. Therefore, this book is also about engaging employees at all levels throughout the organization to create a win-win philosophy.

Everyone is a self-leader, from the chairman and CEO to middle managers, to all employees

We provide a highly customizable approach along with practical tools and resources that will help everyone throughout the organization understand how they can engage in the evolution

of a win-win strategy. Close collaboration among all stakeholders is imperative. Everyone in the organization is a “stakeholder” so involve everyone in the process:

- **Senior Leaders.** The evolution of a healthy and thriving environment, culture and climate will be most successful when all leaders (executives, union leaders, managers, and supervisors) embrace a win-win philosophy.
- **Wellness and Well-Being Leaders.** Wellness coordinators, occupational health professionals, third-party wellness program providers, and training and development personnel are all critical to creative, comprehensive, and effective approaches to support positive organizational and individual health.
- **Operations Leaders.** Individuals with backgrounds in organizational development, human resources, human capital development, wellness, safety, quality, and benefits management will be core to evolving healthy policies, processes, benefits and the built environment, or physical plant of the organization.
- **All Employees.** It is crucial that we include the voices of the employees throughout the planning and implementation process. It is also critical that approaches and conditions foster intrinsic motivation for everyone in the organization. As with safety and quality, wellness and well-being are the responsibility of all stakeholders throughout the organization.

It takes a village.

It is important to remember that this approach will only be successful if everyone has a voice and a stake in each part of the collaborative process of developing healthier and more thriving workplaces and workforces.

How to Read This Book

If you are looking for a quick fix, a blueprint for success, or low-hanging fruit, this might not be the book for you. If you are looking for a new level of thinking and operating, you will find value here.

This book is simultaneously a business justification for a win-win philosophy and a how-to guide to help you play a role in developing a win-win strategy. Wherever you sit in your organization—in the C-suite, or on the shop floor—this book can help you. We hope you will take the time to read carefully through this book and fully digest and reflect on the concepts and practices we outline throughout. We believe this will provide the best chance for success in your efforts to create conditions for healthy and thriving employees and a healthy and thriving organization. However,

we acknowledge that there is a lot in this book to digest, and recognize that many of you are busy with full-time responsibilities. For this reason, we have included the following design elements throughout the book to highlight the core narrative in each section. Some of you may just want to skim the book at a high level and dive deeper into areas where you have the most need or interest. Others may want to read every word.

We have included bolded text throughout the book to emphasize the key aspects of the story line throughout.

We emphasize our own key statements.

We include quotes from prominent individuals both living and from history to emphasize the broader intellectual context of the ideas and practices presented.

Real-world stories and case studies provide practical examples of approaches in use in more forward-thinking organizations.

We have also included many tables and figures throughout the book that include distilled information from each chapter.

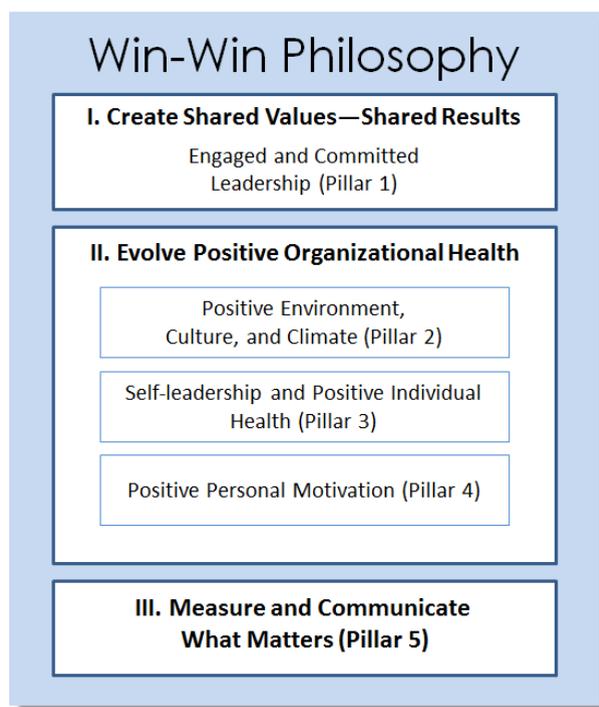
How Is the Book Organized?

Throughout this book, we underscore the value of a win-win philosophy and strategy for organizations and the people who work in them. It might be helpful to think of the ***win-win philosophy*** as the guiding beliefs and principles of the approach (the “why and “what”), and the ***win-win strategy*** as the overall comprehensive plan created to evolve the environment and culture (the “how”). We base our approach on the awareness of the complex and multifaceted nature of human and organizational health. The framework of the book begins with a call to AWAKEN to a bigger way of thinking about the health and well-being of employees. It then follows the three main themes in the win-win strategy (see figure 1):

- 1) ***Create Shared Values—Shared Results:*** The ideal work culture and environment is one where employees and the organization share core values (shared values), and what is good for employees is good for the organization and vice versa (shared results).
- 2) ***Evolve Positive Organizational Health:*** Positive organizational health encompasses having a positive environment, culture, and climate, as well as employees with strong positive individual health and positive personal motivation. Organizations with strong positive organizational health provide caring and positive environments, cultures, and

climates. Individuals and employee work teams engage in healthy choices. The organizations and employees make shared decisions that contribute to flourishing workplaces and workforces. We describe each of these concepts in more detail later, but for now it is most important to understand that they go hand in hand; you can't have one without the others.

Figure 1. Three primary themes of the win-win strategy



- 3) **Measure and Communicate What Matters:** Measuring and communicating what matters demands that we respect what is important to both the organizations and employees. The organization will continue to value productivity, performance, being an employer of choice, social recognition within the community or industry, and financial objectives among others. Employees are likely to value trust, happiness, autonomy, recognition, respect, quality of life, meaningful work, and fair wages.

The major sections of the book outline the value and fundamental principles of a win-win philosophy. We address not only the “why” and “what” for each of our major themes, but also provide ideas for “how” you can create your version of a win-win philosophy.

Our employees are the single most critical factor in our corporate success and in providing outstanding service to our customers. We understand the value each employee brings to the organization, and we want to help them feel and live their best because we understand that a healthy employee is a happy and productive employee. Wellness is a collaborative effort. The company must do its part to provide the tools, resources, and environment to help employees manage their health—and employees must cultivate their intrinsic motivation to change behavior and achieve personal health goals. Ultimately, it is up to each individual employee to change their behavior to become healthier, but it is the company’s responsibility to help facilitate that change through our culture, environment, and financial incentives.

*Rick Chiricosts
Chairman, CEO, President, Medical Mutual of Ohio*

To read the full case study go to appendix B

Awakening

We begin with a challenge to leaders to think and act in a bigger way when it comes to the health and well-being of both employees and the organization.

In chapter 1, we outline the value of the win-win philosophy for all organizational stakeholders. It is important to note that we believe that “stakeholders” include the organization, its shareholders, senior leaders, employees, and their families. We also believe that communities and the larger society have a stake in the success of employees and employer organizations. We describe the senior leaders’ agenda and role in awakening stakeholders throughout organizations to the power of a win-win organizational philosophy.

Over the past decade, we have seen employers expand their view of the total costs of health care to a more inclusive view of the broader economic impact of health. This broader view includes in the cost equation the impact of absence, disability, health-related performance, and lost productivity. Health-care reform has played a key role in this transition but so has the influence of CFOs asking a new set of questions about why to invest in workforce health. The next phase is for more employers to understand better how health influences employee contribution to the business—bringing health to the top line.

*Thomas Parry, PhD
President, Integrated Benefits Institute*

*We believe “stakeholders” include the organization,
its shareholders, senior leaders, employees, and their families.*

We next challenge the reader to adopt a (1) broader view of health that represents a higher level of thriving for employees, and (2) more comprehensive awareness of the factors that influence whether employees and organizations flourish (chapter 2). We use the terms “thriving,” and “flourishing” throughout the book to represent strong positive levels of health and well-being across a broad set of dimensions. These include, but are certainly not limited to mental, emotional, spiritual, intellectual, physical, social, occupational, environmental, cultural, and financial health.

We discuss the breadth and depth of the many known dimensions of health, and the potential for thriving and flourishing. We also describe the concept of **positive individual health** and present a graphic depiction of health that can be used to represent the unique constellation of health’s many known and unknown dimensions for any individual.

Next, we introduce the **model for positive organizational health** (chapter 3). The model provides a framework for understanding the impact of the five fundamental pillars on the environment, culture and climate in organizations, families and communities. It also highlights the influence of all of the factors listed above on the health and thriving of employees. We discuss the importance of using systems thinking and human-centered design (HCD) as we develop meaningful, engaging, and compelling innovations that support and enhance health and well-being to allow employees and organizations to flourish.

Finally, we introduce a framework for the win-win journey process (chapter 4), a comprehensive set of flexible and customizable practices that you can draw from to create a win-win strategy in your organization.

The next three sections of the book follow our three primary themes. We provide practical tools and resources for strengthening the five pillars and moving organizations, employees, their families, and surrounding communities to a higher level of performance by

- promoting shared values and an inspired vision for all stakeholders
- assessing the current status of organizations and developing a plan for a strategic, systematic, systemic, and sustainable approach
- implementing concrete positive organizational health strategies
- implementing concrete positive individual health strategies
- introducing key life skills for continuous learning and growth
- enhancing conditions for positive personal motivation
- defining measures and measurement that matter to all stakeholders; and
- creating communications that motivate

Each organization is unique, so you will need creativity and flexibility to create your organization's distinctive approach to developing positive organizational health.

There is no one-size fits all formula and no step-by-step blueprint for creating positive and thriving workplaces and workforces. There are as many paths along the journey as companies on the voyage.

Theme 1. Creating Shared Values—Shared Results

*Organizations win when employees win,
and employees win when organizations win.*

In the ideal work culture and environment, the employees and the organization share complementary core values (shared values), where everyone understands what is good for the health and well-being of employees is good for the company and vice versa (shared results). When it is clear to everyone involved how employee and company health and thriving can benefit each in ways that matter to them (shared results), we have the ultimate win-win situation. Organizations that practice Shared Values—Shared Results and help employees live according to their personal and professional values and purpose will have a significant competitive advantage.

We begin this section by discussing what it means to lead the effort to evolve a win-win philosophy. Most understand that leadership is critical, but not everyone appreciates what it looks like to embody the type of leadership needed. We briefly outline what are currently considered “best practices” for leadership related to wellness and well-being programs. We then present emerging “next practices” for leaders that can help them start a movement to permeate wellness and well-being into the culture and fabric of the organization. We challenge leaders to think beyond the status quo and explore a new generation of approaches to help both individuals and organizations flourish.

To create a true culture of well-being that is sustainable, the leadership must view well-being as part of their overall business strategy with a clear set of strategic objectives, a defined process, and meaningful measurement. These types of programs can have a far greater chance to be seen as an essential element of the human capital management strategy, thus resulting in more effective and higher employee engagement.

*Colleen M. Reilly, MBA/MSM
President, Total Well-Being*

Theme 2. Evolve Positive Organizational Health

We imagine thriving organizations whose criteria for success are about more than power and wealth.

We see a world where resilient, thriving individuals are engaged in high-quality and meaningful work, collaborating with creative and inspired colleagues in organizations where they feel supported, challenged, and valued.

This section is intended to provide concepts, practical guidance, techniques, and methods that will help you develop flexible and creative strategies and put them into practice. We encourage keeping an open mind to integrating a broad range of ideas from a variety of disciplines that will help make the initiative more appealing to all stakeholders.

Whereas moral courage is the righting of wrongs, creative courage, in contrast, is the discovering of new forms, new symbols, new patterns on which a new society can be built.

—Rollo May, *The Courage to Create* (1975)

Evolving a win-win philosophy and strategy in your organization requires environmental and cultural practices that help both employees and organizations operate at their highest potential. This approach also involves creating policies, benefits, development opportunities, and environmental and cultural practices that align with and promote positive individual and organizational health. In organizations with strong positive organizational health, organization and union leaders and all employees are committed to respecting and trusting each other, and structuring workplace environments and cultures that produce the best possible results.

Employers didn't fix safety by ignoring culture—they purposefully created cultures of safety. Similarly, organizations need to see choices about health and medical care as reflecting the absence of a culture that truly values health as human capital. Healthy companies grow healthy employees and families through projecting every day that contributing to the best of one's ability is an expectation—and shared responsibility.

*Michael Parkinson, MD, MPH, FACPM
Past President, American College of Preventive Medicine*

Theme 3. Measure and Communicate What Matters

For many years, evaluators of wellness programs and initiatives have focused on a relatively narrow set of measures, methods, and questions. In this section, we outline our recommendations for taking measurement and communication to a higher level by:

- Using a broader lens on the types of information that we collect to evaluate progress and gathering information that matters to all stakeholders throughout the organization.
- Evolving our questions to get better answers.
- Collaborating with all stakeholders during evaluation planning and implementation.
- Expanding our methods for collecting and synthesizing the information that we collect—methods that encourage collaboration and engagement of all stakeholders.

Measuring and communicating what matters is about evaluation and feedback for decision-making, momentum, and sustainability. It is about generating and distributing meaningful information that demonstrates to all stakeholders how the organization is progressing toward the vision. It is also about using measurement to achieve what you seek.

Like all companies, we've seen a steady rise in healthcare costs for many years. The hospital employee population is not immune to the cultural changes that have contributed so hugely to the health epidemic in our nation. I believe we in the healthcare profession have a special obligation to "walk the talk" if we are to impact the downward spiral of health in America. As it turns out, initiating health-focused steps for our workforce is helping our bottom line as well. Healthy, thriving employees have a direct and positive impact on a healthy, thriving, and high-performing organization.

*Margaret Sabin
President and CEO, Penrose-St. Francis Health Services
President, Centura Health South State Operating Group*

Final Words

In our "Final Words," we provide a call to action to organizations and stakeholders worldwide to embrace a new way of operating, and engage in disruptive innovation that will take the health and well-being of individuals and organizations to a higher level. We challenge our readers to embrace and undertake a more strategic, systematic, systemic, and sustainable approach to achieving positive individual and organizational health.

What Does It Take to Evolve Positive Health in Your Organization?

A win-win strategy is core to the long-term success of your organization

It will take collaborative, creative leadership to develop a healthy and thriving culture and climate and thriving employees. So it is not coincidence that three of the five pillars are about leadership. It will take committed senior leaders, motivated and aligned operations leaders, plus the engagement of self-leaders throughout the organization. A clear and inspiring shared vision based on shared values and shared results is imperative.

As time goes on, high-performing, talented workers are going to be in short supply and high demand by thriving companies. And one of the things that these workers are going to look for in a company is not only a place where they can grow professionally, but where they can reap the personal benefits of health and well-being. Research shows that organizations can make changes that will improve the well-being and performance of their workers. The company that can provide both professional and personal growth will attract and retain better talent and reap higher productivity and loyalty from their workers.

*Michael Friedman, PhD
Clinical Psychologist, Medical Advisory Board, EHE International*

All stakeholders need to see how their health and thriving contributes to the organization's vision and understand the value they bring to the success of the enterprise. They also need to recognize the value they receive from the organization's success. As all stakeholders come to understand their respective key roles, their sense of engagement, retention, and performance will grow, as will their loyalty to the organization and their sense of ownership in the vision.

Involve all levels of leadership—embrace everyone as a leader!

Coming together is a beginning, staying together is progress, and working together is success...[a] company will not be successful unless employees are successful, and employees will not be successful without the company being successful.

—Henry Ford

About Edington Associates

The promise of Edington Associates and the Institute for Positive Organizational Health is a meaningful learning experience to ensure that health and well-being is a primary consideration in decisions of individuals, employer organizations, communities, and society.

Consultation:

- **For employer organizations** - we can help you take your wellness and well-being approaches to a new level of effectiveness.
- **For service providers** - we can help increase your capacity to deliver meaningful and impactful services to your client-partners.
- **Culture consultation** (on-going over several months): Adjusting the culture of a work team or a department or even the total organization requires a dedicated Associate working with committed participants.
- **Measurement and evaluation:** Help organizations evaluate and communicate about progress toward the vision and objectives that matter to employees and the organization.

Presentations and Workshops:

- **Presentations** (one-hour, half-day, full-day): Presentations are tailored to the intended audience, to the culture of the organization, and to the population of key stakeholders.
- **Workshops** (half-day, full-day, multiple day): Workshops are designed to engage participants in specific objectives and conducted typically in work teams.
- **Intensive training** (two- to five-day workshops, and ongoing training and development over an extended period of time): Extensive training in the understanding and use of concepts, methods, and materials of the win-win philosophy.

Products and Tools:

- **Self-Leadership Project** (Web-based Platform): Change, Decision Making, Resilience, and Self-Leadership.
- **Landscape Assessment:** Helps organizations understand their current state regarding support for employee health and well-being. Includes both qualitative and quantitative inquiry tailored to organization.
- **Culture Assessment** (More in-depth than the Landscape Assessment): Includes appreciative inquiry, environmental audit, survey of the culture and climate, and other exploratory methods to fully understand the culture of the organization (e.g., interviews, organizational ethnography, etc.).
- **Living and Thriving Assessment:** Next generation health assessment that examines employee health and well-being, as well as the culture of the workplace, home, and community.
- **Health Environment Check (HECheck):** Conducted as part of the Culture Assessment or as a stand-alone comprehensive audit of the organization's health-supportive environment.
- **Program Impact Measure.** Modeling tool that helps predict the impact of your current or potential health management approaches.

About the Authors

Dee W. Edington, Ph.D.

Dr. Edington is an Emeritus Professor at the University of Michigan having served as Professor and Director in the School of Kinesiology and Founder and Director of the Health Management Research Center. He spun off Edington Associates LLC in 2010 to help, “Organizations ensure a thriving, high performing and sustainable workplace and workforce.” He is the author or co-author of over 1000 articles, presentations, and several books, including *Championship Age-Group Swimming*, *Biological Awareness*, *Biology of Physical Activity*, *Capstone Knowledge in Kinesiology*, *The One Minute Manager Balances Work and Life*; *Zero Trends: Health as a Serious Economic Strategy*; and now *Shared Values—Shared Results: Positive Organizational Health as a Win-Win Philosophy*.

Dee received his BS and PhD degrees from Michigan State University and completed his M.S. at Florida State University. He held a post-doctoral position at the University of Toronto and was on the faculty at the University of Massachusetts and Chair of Exercise Science before coming to Michigan in 1976. He has received Career, Lifetime, or Prestigious Lecture Awards from the American College of Preventive Medicine, American College of Occupational and Environmental Medicine, Thomas Jefferson College of Population Health, US Navy Medical and Safety, Society of Prospective Medicine; Health Enhancement Research Organization; Michigan State University, National Business Group on Health, Top 10 Human Resource Executive Leaders for 2014; State of Michigan Governor’s Lifetime Achievement Award.

Jennifer S. Pitts, PhD

Jennifer Pitts, PhD, received her doctorate in Social Psychology, a masters degree in Experimental Psychology, a bachelors degree in Behavioral Sciences, and held a two-year Agency for Healthcare Research and Quality (AHRQ) postdoctoral fellowship at UCLA’s School of Medicine. Jennifer has been exploring the health-related influence of social support, engagement in treatment decisions, and meaning in life and work for the past 25 years. Most recently, she has focused on the impact of positive organizational cultures on the ability of employees to thrive in their work and lives.

Dr. Pitts previously held positions at UCLA’s Division of General Internal Medicine and Health Services Research, Kaiser Permanente Organization Effectiveness Division, and at Casa Colina Medical Rehabilitation Hospital in Pomona, California. She spent 12 years with Pfizer Health Solutions Inc (PHS) as the Director of Outcomes and Analytics before co-founding Edington Associates in 2010. Jennifer is Co-Founder and Chief Strategy Officer at Edington Associates, LLC. She recently founded The Institute for Positive Organizational Health, a non-profit with the mission of improving the health and flourishing of individuals and transforming the context, culture, ecology, and economy surrounding health in organizations, communities, and society.