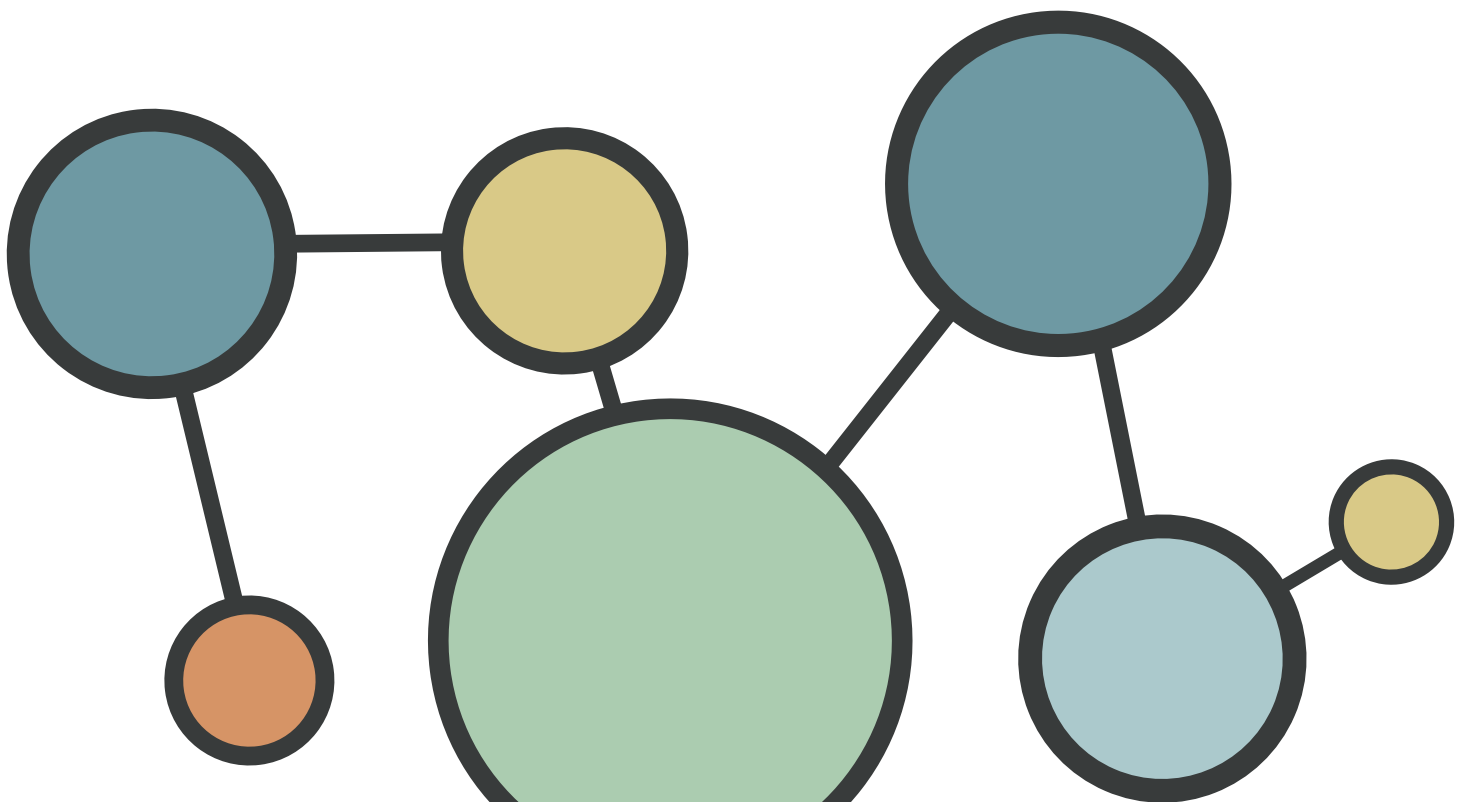


SEVEN POINTS OF TRANSFORMATION



DR. ROSIE WARD + DR. JON ROBISON ON HOW TO BUILD A THRIVING CULTURE AT WORK

SEVEN POINTS OF TRANSFORMATION

with

DR. ROSIE WARD & DR. JON ROBISON

ABOUT ROSIE WARD, PH.D., MPH, MCHES, BCC, CIC[®], CVS-FR



Dr. Rosie Ward is a consultant, professional coach, and author known as a thought leader who challenges the status quo, pushes boundaries, and engages people and organizations to find success through shifting old, ineffective thinking habits. She has a diverse background with over 20 years of experience promoting wellbeing, employee engagement, and transforming organizations in various settings. As CEO and co-founder of Salveo Partners, LLC, Dr. Ward consults with organizations, blending the worlds of Organizational Development and employee wellbeing to provide a unique approach to create thriving workplace cultures that free, fuel, and inspire people to bring their best selves to work. Rosie is co-author of the popular book *How to Build a Thriving Culture at Work: Featuring the 7 Points of Transformation* with business partner and co-author Dr. Jon Robison.

ABOUT JON ROBISON, PH.D., MS, MA, CERTIFIED INTRINSIC COACH[®]



Dr. Jon Robison holds a doctorate in health education/exercise physiology and a master of science in human nutrition from Michigan State University where he is Adjunct Assistant Professor. Dr. Robison is also Adjunct Associate Professor in The Holistic Health Care program at Western Michigan University. Jon has authored numerous articles and book chapters on a variety of health-related topics and is a frequent presenter at conferences throughout North America. His new-released book: *How to Build a Thriving Culture at Work: Featuring The 7 Points of Transformation*, written with co-conspirator Dr. Rosie Ward gives organizations a realistic, step-by-step blueprint to accomplish the difficult task of transforming their cultures to be healthier and more productive—“from the inside out.”

ABOUT RYAN PICARELLA, MS, SPHR



As President of WELCOA, Ryan works with communities and organizations around the country to ignite social movements that will improve the lives of all working people in America and around the world. With a deep interest in culture and sociology, Ryan approaches initiatives from a holistic perspective that recognizes the many paths to well-being that must be in alignment for long-term healthy lifestyle behavior change. Ryan brings immense knowledge and insight to WELCOA from his background in psychology and a career that spans human resources, organizational development and wellness program and product design. Prior to joining WELCOA, Ryan managed the award winning BlueCross BlueShield of Tennessee (BCBST) Well@Work employee wellness program, a 2012 C. Everett Koop honorable mention awardee. Since relocating to Nebraska, Ryan has enjoyed an active role in the community, currently serving on the Board for the Gretchen Swanson Center for Nutrition in Omaha. Ryan has a Master of Science in Industrial and Organizational Psychology from the University of Tennessee at Chattanooga and a Bachelor of Science in Psychology from Northern Arizona University.

People often can become overwhelmed when thinking about changing culture, but it doesn't have to be overwhelming. In this interview, Rosie and Jon present a blueprint that leverages their 7 Points of Transformation for building a thriving culture at work.

★ **RYAN PICARELLA** One question that is an interesting conversation piece is the notion of defining health, wellness, and well-being. Even for people that have been in the field for a long time, it's always a good dialogue to get into. What is wellness? Is there a difference between wellness and well-being?

JON ROBISON Well let me just say I don't really like the terms wellness or well-being; I like the term health. This is something that I've been interested in for more than two decades now. When I do a presentation, I often begin with the questions, "What is health? What does it mean to be healthy?" Usually what I do is throw out the World's Health Organization definition on a slide. Their definition is probably the most commonly repeated one: "a state of complete physical mental and social well-being, not just the absence of disease and infirmity." I'll ask, "What do you think about this?" Usually everybody's seen it and it's just sort of tacitly accepted. Then I ask everybody to stand up and I'll say "I'm going to ask everybody who has the absence of disease and infirmity to remain standing." But before we do that, we've got to make sure we are all on the same page with the definition. You know if you have a disease or not, right? But what about this term infirmity? Then I will show that infirmity is defined as "a bodily ailment or weakness usually due to age, or a failing or defect in a person's character." Then everybody laughs.

I say "Okay, now everybody who has the absence of those things remain standing." In a group of 300 people, 250 will sit down. Now we've got further to go, because in order to fill this definition you also need to have a complete state of physical, mental, and social well-being. And so I'll say "please remain standing if you fit that definition." At that point almost everybody sits down. If there are one or two people still standing, I might remind them that telling the truth is a sign of mental health and everyone laughs again as they sit down as well. The point I try to make is that this kind of definition, which is typical of the definitions we use for health, really doesn't apply to the human species. Nobody fits this definition.

"The point I try to make is that this kind of definition, which is typical of the definitions we use for health, really doesn't apply to the human species. Nobody fits this definition."

Then I say, how can we think about redefining health to make it more applicable to our species? The definition that I like the best comes from David Morris, from a book called *Illness and Culture in the Postmodern Age*. He says “health is the manner in which we live well, despite our inescapable illnesses, disabilities and trauma.” That’s my favorite of all of the definitions because it speaks to two things: the inevitability of these problems, and removing the blame when they occur. That is such a problem with health professionals, the line of thinking that suggests that whatever condition we acquire, we got it because we didn’t do something right. It also helps to put our understanding of health in the bigger context.

Some of the leaders in our industry have these linear explanations of health – definitions of optimal health or high level wellness. As you move to the right, you gradually get to where you have absence of disease, in the middle there’s nothing much, then chronic disease, and then death. This scale is meant to see where you fit on that continuum, and for me that’s problematic, especially since I have a chronic, degenerative, progressive disease. Yet I consider myself healthy in terms of being able to contribute and be involved in life.

ROSIE WARD To build on Jon’s point about linear explanations of health, I really think we have to take into consideration the broader context. We have different cycles and stages of life; it’s more about whether, at any given point in time, you’re able to live what you define as your best life and your purpose. I have chronic thyroid disease; does that mean that I’m two steps from the grave and going to be a productivity and healthcare problem? Apparently so according to those linear models. Do I have days where I have more energy, feel more alive with my purpose and more connected socially than others? Yes. But I’m still usually highly engaged in my work, connected to my purpose, a diligent healthcare consumer and a fairly low utilizer of healthcare – none of which really has anything to do with whether or not I ate broccoli, meditated or exercised; it’s more complex than that.

So when it comes to terminology, we’re not anti-wellness in terms of using that word. The problem is that older models of wellness were very comprehensive and included occupational/vocational and other areas of health. But what wellness has become in practice for the majority of the industry is what we call “Wellness or Else!” – a reductionist model focused on biomedical risk factors, putting people on a continuum and trying to force behavior changes. Unfortunately, this has only increased with the wellness provisions in the Affordable Care Act. Given this, the term “wellness” has developed a really bad connotation for the people that are on the receiving end of these types of programs.

The reason we’ve shifted our language is to try to draw a line in the sand and differentiate from “Wellness or Else!” So we’ve adopted “wellbeing” to piggy-back off of Gallup’s research. But even then, it’s critical to define what you mean by wellbeing; just changing the terminology doesn’t change the approach or understanding, and many employees will still think it’s the old-school wellness focused on biomedical risk factors and incentives. So it’s not just about the words you use, it’s what you do to support it. This, combined with the way Jon just described it, is what we’re trying to be mindful of in the work that we do.

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JON ROBISON We want to make sure that we don't do to wellbeing what we did to wellness. Back in the 60s and 70s, those definitions of wellness were very holistic. Unfortunately, the definition got "bio-medicalized" over time.

★ **RP** How do we create, and what is this culture of health? You both talk about culture versus climate. Tell me a little bit about what the difference is between the two, and why it's important to have that distinction?

ROSIE WARD What's interesting is that it is not just our field that is confused about the definition of workplace culture; it's everywhere. I do this activity when I speak at conferences where I put items up on the screen and say, "If you think the statement is reflective of culture, please stand. If you think it is climate or environment remain seated," and it is like popcorn; they're up and down all over the place and confused – no matter who is in the audience. I think there is widespread confusion because the term "culture" has become the buzzword in whatever industry that deals with the human experience at work.

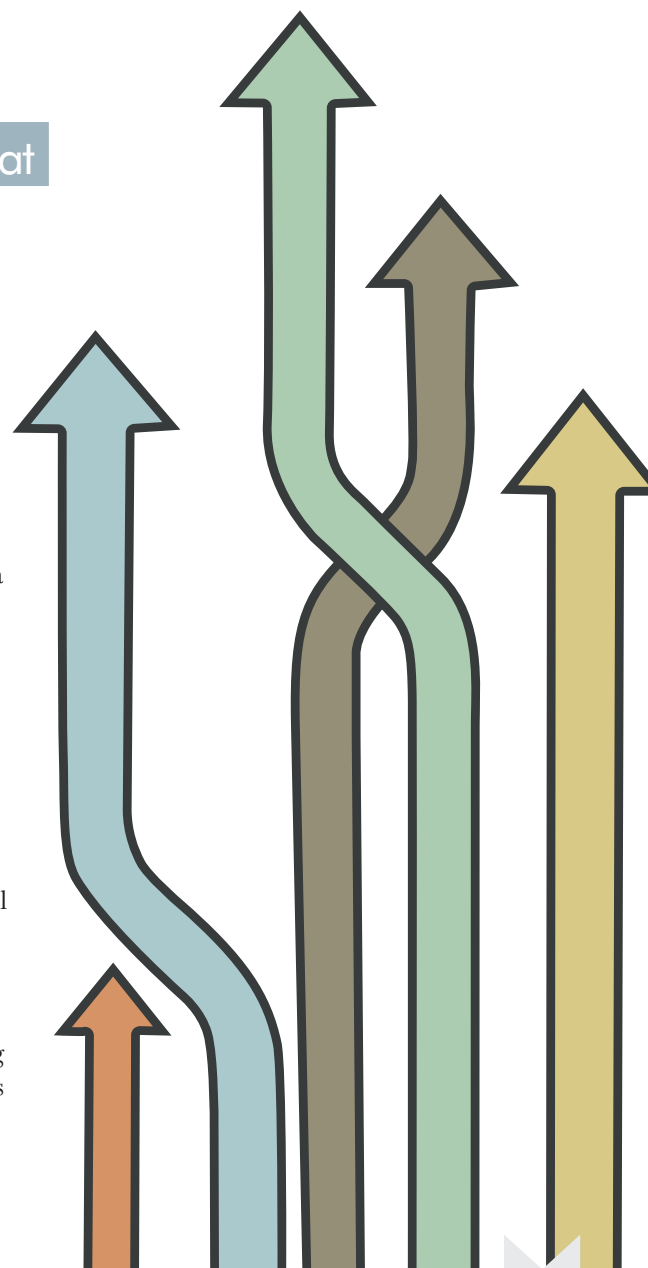
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People learn well by metaphors, so we always use this metaphor of a river because it's the best way to describe it for people. Everything that you can see or touch - from the shape of the riverbed, to how strong the current is, to how rough or smooth the water is – in other words, all that is on the surface, is climate. That climate is a manifestation of what's happening beneath the surface. You can't see it, but if you get in the water you can feel the current. That underlying current is a good metaphor for culture.

Organizational culture expert, Dr. Edgar Schein, defines culture as the unconscious, hidden, taken-for-granted beliefs, attitudes and values that powerfully guide the strength and direction of the organization and ultimately shape behavior. So it's really the underlying *thinking* that manifests itself in the climate and in the behaviors of what it means to do business. However, too often people try to plop a pebble, a climate intervention, in the water. But it doesn't work – especially if it's not aligned with a core culture where people ultimately feel valued as human beings.

And climate interventions and traditional behavior change programs don't do anything to fundamentally shift and alter thinking because they're not supporting what is needed for people to actually create new neuropathways in the brain. This is critical because our behaviors are a manifestation of our underlying thinking, just like climate is a manifestation of culture. This distinction is so important, because when our industry talks about a "culture of health," they're not actually

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talking about culture whatsoever; they are talking about climate – a climate that has an environment, programs and policies that support healthy lifestyle behaviors. So a more accurate description would be “climate of health.”

Think about it, in considering the actual definition of organizational culture, you can easily have a so-called “culture of health” yet at the same time have an absolutely dysfunctional underlying organizational culture where people don’t feel valued. Who cares if you have a “climate of health” if the underlying actual culture is toxic? The late management guru Peter Drucker put it best when he said that “culture eats strategy for breakfast, operational excellence for lunch and everything else for dinner.”

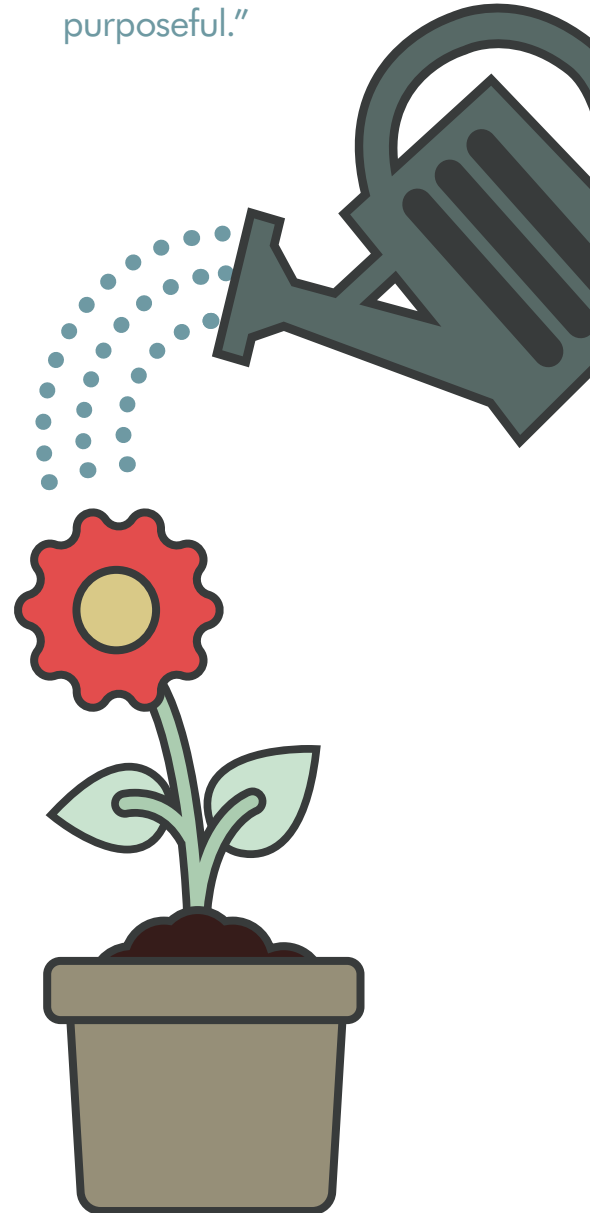
That said, these underlying attitudes and values have to be operationalized on a daily basis – which is where climate comes into the picture. The climate needs to provide the structure and the guardrails for the underlying culture to be realized. But if it’s misaligned with the culture, it won’t matter; culture will trump climate every time. Trying to implement “culture of health” practices by nudging people to make healthier choices is fine if the underlying culture supports it. But if people go to work and hate what they do, feel disrespected, and experience lack of trust, they won’t care if any of those programs exist and may even resent it because they’d rather that resources are spent to help their work experience be more meaningful and purposeful.

Therefore it is so critical to intentionally align culture and climate. Just like a garden, you have to tend to and nurture it. You can’t just let it go. Organizations that tend to their culture are intentional about saying “This is who we want to be. If we’re not there, this is the work we’re going to do to align it. Or if we’re there, this is what we’re going to do to protect it.”

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JON ROBISON Employee engagement is a very well-known construct in the business world. And so is organizational health. We always try to go back to the root of the definition, and Patrick Lencioni is a great resource, particularly in terms of management and leadership development, in his book *The Advantage*. I’ve found his writing to be crystal clear. People who are in the wellness space can understand what he’s saying. He talks about a healthy organization as one that has minimal politics and confusion, high morale and productivity, and low turnover. When you think about the traditional wellness definition of a “culture of health,” the discussion usually turns to gym memberships, and the ability to get broccoli in the cafeteria. And they might have a stress management or meditation class, or something that has nothing to do with organizational health in terms of the culture. Again climate is important, but without that underlying healthy organizational culture as defined by Lencioni, there’s just not much that’s really going to happen. Lencioni is very clear about that. He says companies need to be smart and healthy, and that companies spend 90% of their time being smart and only 10% of their time being healthy. He believes that this is the distinguishing factor between companies that make it and companies that don’t.

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★ **RP** Where is the intercept of health and wellness and organizational development, and where's the difference? Are you suggesting the term wellness will disappear and become organizational development?

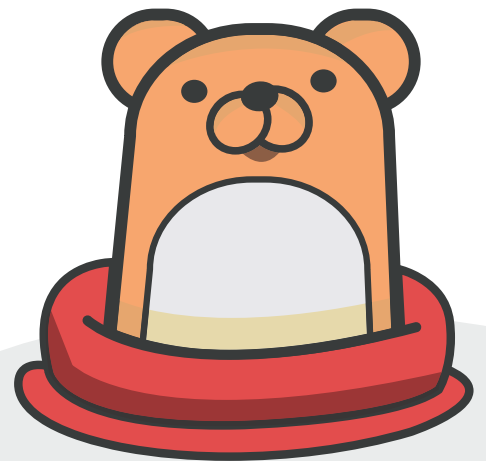
ROSIE WARD Historically these two disciplines are completely siloed. Where they intersect is quite simple; you're dealing with a whole person. There's a movement happening beyond just focusing on employee engagement. Although engagement is important, it hasn't changed in 30 years. Wildly successful companies consider the entire employee experience – meaning are people able to bring their best selves to work each day and their best selves home?

Because organizational development (OD) is usually separate from health and wellness, companies end up wasting a lot of time and resources playing essentially a bad game of Whack-a-Mole – trading off hopeful solutions in one area only to have unintended consequences show up elsewhere. For example, the OD side of the house might be putting in programs to try to improve engagement (e.g., recognition programs, changing operational work flows, etc.); but they may be ignoring the fact that people are experiencing burnout and that organizational stress is a huge contributor and eroding individual wellbeing. So their efforts will fall short. Similarly, on the wellness side these biomedical-focused “wellness or else!” programs are put in to try to mitigate healthcare costs, yet they are the complete antithesis to everything we know about wellbeing and end up eroding engagement and more. So both areas mean well and are trying to do good, but they end up unintentionally undermining each other's efforts.

That's why the foundation of our entire approach is what we call *The Fusion*. It's integrating organizational development and employee well-being efforts so that when you're dealing with people, you're supporting them as a whole person and looking at the entire employee experience. I'm not suggesting wellness will disappear (although we certainly hope “wellness or else!” goes far, far away). There is tremendous need for understanding how to effectively support individual wellbeing, enhance self-awareness and mindfulness, support better thinking (vs. just behavior modification), and provide quality coaching to support people in navigating adaptive challenges. And there is need for the disciplines that understand how to affect change on an organizational level. So there's room for everybody to have their unique niches. But, at the same time, they both intersect at dealing with the complexities of human beings. Therefore, they have to align and work together and cannot be separate.

We often talk about the integration of our work-side and self-side. With *The Fusion*, it's recognizing the importance of everything that impacts that individual. So we see it as an opportunity for people to grow as professionals and expand their scope of practice. It doesn't mean wellness professionals need to become OD experts or vice versa. But there's an opportunity for everyone to grow and be more effective with what they do since they both impact the employee experience. For example, wellness professionals can learn from their OD counterparts how to better affect

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change in their organization and what might be undermining their efforts. Likewise, OD professionals can learn how important it is that employees have a solid foundation (i.e., supported wellbeing on their self-side) in order for their efforts to be successful. It's about creating partnerships; this isn't a solo journey.

I will say that my fear is that wellness professionals clinging tightly to outdated practices will be without a job at some point. Every field has to evolve; but wellness has been stuck doing the same thing over and over for the last five or ten years. Even health care is dramatically different than it was a few years ago. If we don't evolve, we're not going to be relevant. And as data keeps emerging that challenges the old-school message and business case of wellness (i.e., saving money in healthcare costs and productivity), wellness professionals are put in a position of having to validate their worth. So rather than being afraid of the evolution and clinging tightly to the past, there's an opportunity to become part of the larger people strategy within an organization and actually be more relevant.

JON ROBISON I agree completely. My first book was called *The Spirit and Science of Holistic Health*, and it was 20 years ago that I started writing it. It was all about mind, body, spirit and how important all three are if we're looking at a human being. If you leave one of them out, then it's problematic. If you're going to deal with the person's physical aspect, but not with the social, emotional, or spiritual aspect, you're not going to get very far. It's the butterfly effect, right? Everything affects everything. There is so much that goes into this from the organizational and individual perspectives, so many people's first response to our intensive training is to be overwhelmed. And we say to them, this doesn't mean that we have to be a leadership development expert, an OD expert, a benefits expert and a wellness expert. What we have to do is work together and find the people in the organization who we can align with and work with to create this bigger picture.

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★ **RP** What are first steps in building those relationships to create thriving cultures at the workplace? What types of things need to be focused on?

ROSIE WARD Again, I go back to Dr. Edgar Schein; he says that the worst way to change culture is to focus on changing the culture; instead, we need to focus on leadership practices. It makes sense, because we know that every interaction a person has with a leader influences his or her belief about the culture. And, according to the *2016 Deloitte Global Human Capital Trends Report*, 89% of organizational leaders now view leadership development as a key priority; but they are realizing the need to look at it in a way that is more science-based and develops leaders more quickly.

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I think a lot of wellness professionals miss the mark because they assume leadership development has nothing to do with them. But when you start aligning with the people who do training and development or leadership development, there is a tremendous opportunity. We have found a door-opener to collaborating is using this 4-step framework for leadership development:

1. increase self-awareness
2. build effective thinking skills
3. develop and foster quality relationships so others can grow
4. grow the organization.

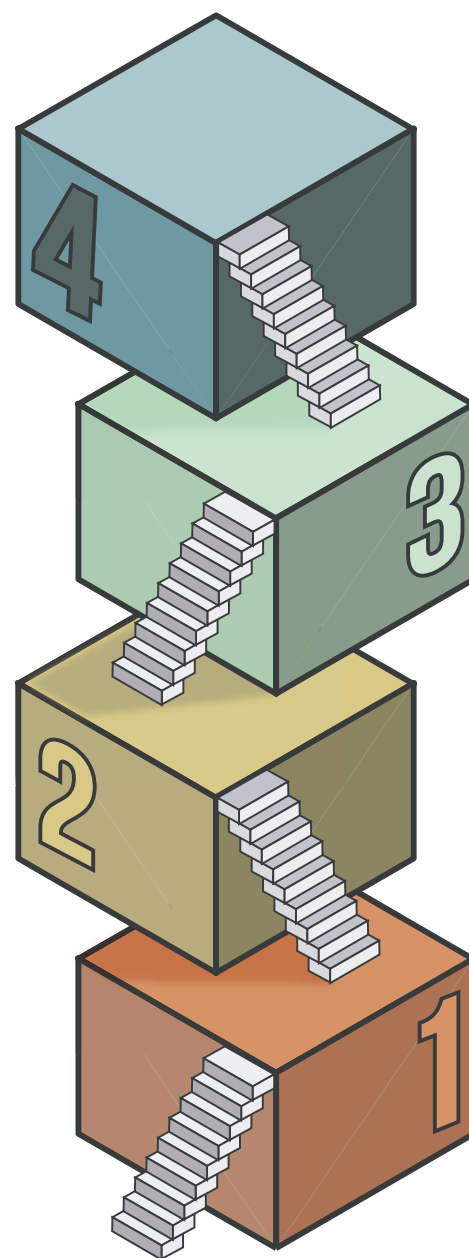
We developed and use this framework not just for formal leaders. We use it to help develop a *leadership mindset* in everyone. And we've found this framework deeply resonates with people because they realize they have to do self-work in order to be effective with other people and to have traditional leadership skills training stick. What most organizations typically do is jump into step three. They might send people to a workshop on emotional intelligence or how to have difficult conversations. These types of training are fine but usually focus on the tactical details about being a leader. However, if as a leader, my foundation isn't there because I'm burned out and stressed or bumping up against an adaptive challenge, I'm not going to be able to effectively apply those skills.

We usually use this framework to do an initial leadership development audit and find gaping holes in steps 1 and 2. Herein lies the opportunity; the first 2 steps are so critical for sustainability. In fact, self-awareness is the fastest growing competency right now in leadership development. And because we know behaviors are a manifestation of thinking, it's critical to support people in developing better thinking skills – particularly about dealing with adaptive change. Within both steps lies opportunity for wellness professionals to be considered an essential part of the organization's leadership development strategy.

Here's another way to think about how to leverage this framework as part of a culture transformation and wellbeing-enhancing strategy: If we put people, including leaders, through training, or a behavior modification program and say "Do things differently," when we haven't done the work to help them be self-aware, pause and think differently, it's never going to work. When applied well with programs, coaching and teaching strategies that foster adult learning, this framework can shift thinking...and then behaviors, one step at a time.

At the heart of leadership practices that foster a thriving workplace culture is letting people think for themselves. So we look for opportunities to shape a culture that fosters autonomy, mastery, and purpose - the foundations for intrinsic motivation. And anything that we can do that starts reducing dependence on incentives, allows people to be treated like adults, helps leaders treat people with more dignity and helps them address their adaptive challenges is crucial. Developing leaders at all levels in a comprehensive way can be a conduit for building a thriving culture. Most wellness professionals have some level of skill in being able to step into this arena, but they just haven't thought about it that way.

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★ **RP** Let's dive into the seven points you use in your program.

ROSIE WARD People often can become overwhelmed when thinking about changing culture, but it doesn't have to be overwhelming. We use the analogy that trying to build a thriving culture at work is similar to building a structurally sound and aesthetically pleasing house. If you're going to use outdated materials (i.e., outdated sciences and paradigms) and skip important steps, the house is going to crumble and be about as stable as one built on quicksand. But then it takes another level of attention and intention to turn that house into a home—a home where people feel valued, loved and can flourish and grow.

Our blueprint that leverages *The Fusion* is called *The 7 Points of Transformation* and is detailed in our book, *How to Build a Thriving Culture at Work*.

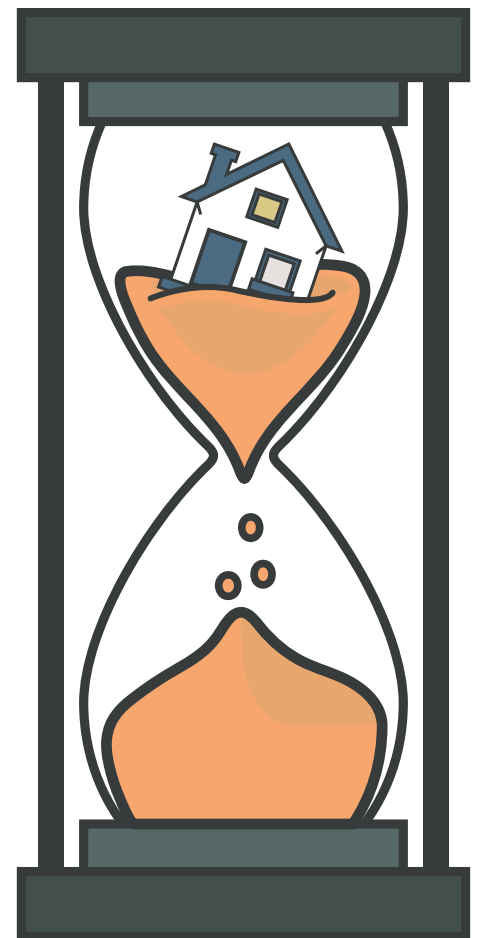
1. TRANSFORMATION POINT #1 – SURVEY THE LAND (DATA COLLECTION AND ANALYSIS)

You need to understand your current state. But it's taking a New Paradigm approach to data rather than an Old Paradigm approach. Typically we are addicted to numbers and want to reduce people down to a number, measuring every little thing. We forget about the value of qualitative data as well and that not everything that counts can be measured, not everything that can be measured counts. With that, it's important to be thoughtful about what data is meaningful to help you understand the current state of your organization.

This is also where *The Fusion* starts to be formed. For example, typically what happens is a company will look at Workers' Compensation claims and then develop a safety program to "fix" the issues. Then they might look at medical claims or health risk assessment data and design a wellness program to try to "fix" the issues. Then they might look at employee engagement or exit interview data and design programs to "fix" those issues. And the trend continues, typically leading to missing key opportunities for alignment and getting stuck back in that game of Whack-a-Mole. Instead, we suggest bringing your partners to the table and looking at all of the data together at one time. Chances are you will start to see how things may be related and can come up with more thoughtful strategies, and hopefully reduce the tendency of jumping in with these Band-Aid programs. This is also the step where, if you don't have the data, you may or may not want to deploy a culture survey.

Another thing to be mindful of at this stage comes from well-known organizational learning expert, Peter Senge. He talks about one of the critical learning disabilities of organizations with the "parable of the boiling frog." If you drop a frog in boiling water, it will leap out because it's hardwired to respond to dramatic external threats in its environment. But if you put it in a room temperature pot of water and slowly increase the temperature, it will become lethargic and eventually succumb to its demise because it's not programmed to respond to subtle threats. Senge says that organizations are like the frog; they wait until they're in hot water and then frantically look for quick-fix solutions. But what's the subtle feedback? Have people been complaining for years about stress, poor leadership or other frustrations?

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It's important to pay attention to both the subtle and the dramatic feedback and looking more at that data as a form of fluid and ongoing feedback than as an absolute measure.

2. TRANSFORMATION POINT #2 – CREATE THE BLUEPRINT (STRATEGIC AND ANNUAL PLANNING)

Once you have a good understanding of the current state, you can begin planning for what you want to do and clarifying the direction you're headed. Once again, this is taking a New Paradigm approach to strategic and annual planning. The Old Paradigm approach typically involved an organization spending a lot of money on a consultant and then having the executive team go off on a multi-day retreat, come back with a plan, and then push that plan out to the managers and employees to execute. Or when it comes to wellness planning, it's usually a committee sitting in a room creating a plan and pushing it out, hoping the employees engage.

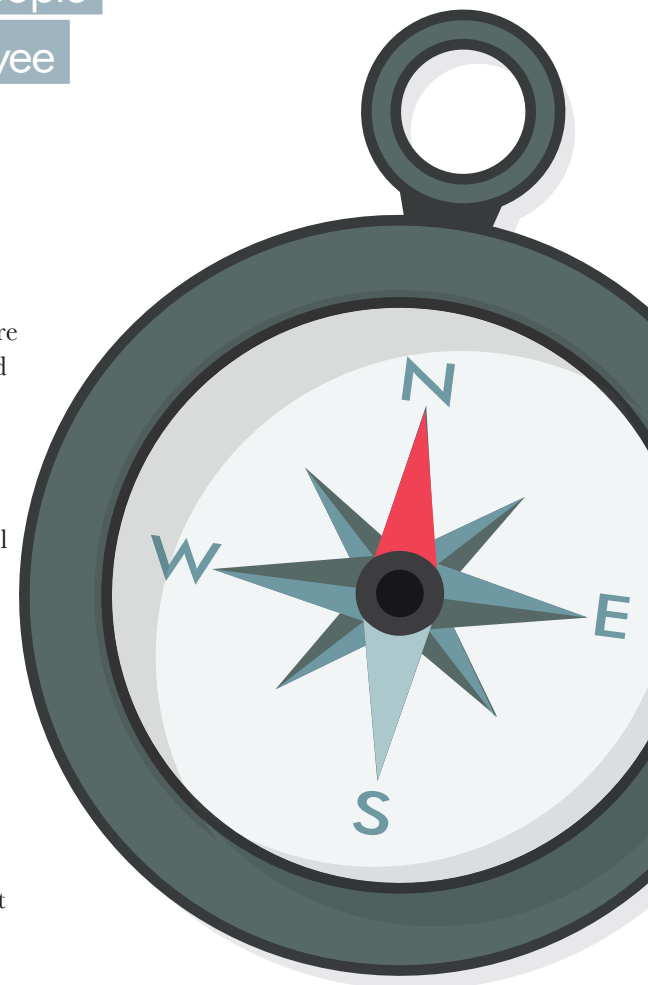
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However, what we know from the research is that people only support what they have helped to create. So we look at how to include as many people as possible in envisioning what the future employee experience and culture will look like. Then let the people create their own guiding principles for living into that desired culture by defining what behaviors are and are not consistent with the desired culture and how they want to support and hold each other accountable for living the desired culture on a daily basis. When they get to help create their work experience, they have a very different level of engagement and attachment to it. And then you back it up and look at what will make the biggest difference in moving the needle towards that desired state over the next 12 months; that starts to form your annual plan and objectives. But it's also important to realize that the plans are fluid, not rigid and use them as a guide as you embark upon your culture journey.

3. TRANSFORMATION POINT #3 – POUR A SOLID FOUNDATION (DEVELOP QUALITY LEADERS)

This is the first place where you see cracks in the infrastructure, and probably why Schein says impacting leadership practices is the most effective way to shift a culture. As I stated earlier with our 4-step leadership development framework, it's really about looking at leaders as people first. This means making sure we're helping them think better and navigate their adaptive challenges before we expect them to behave differently.

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4. TRANSFORMATION POINT #4 – FRAME THE HOUSE (CREATE A SUPPORTIVE CLIMATE)

This is where climate finally starts to align with culture – AFTER establishing a vision and plan and having a solid foundation, not before it. How you position wellbeing is an important aspect of aligning culture and climate. Instead of it being a program or an event, wellbeing becomes a platform for the employee experience and part of your cultural brand in terms of how you value and support your employees as people. Then, from a marketing and communication perspective, you can start looking at all of the things your organization does in each area of wellbeing to support employees and then develop a holistic communication strategy so people start to see how things fit together. In addition to having an aligned communication strategy that also reinforces culture, values and vision, a supportive climate includes making sure good business practices are used to reinforce the desired culture. For example, it's important for leaders to help communicate the need for change to employees and to walk the talk in terms of living the core values and desired culture of the organization; this is much different and much more meaningful than whether or not leaders participate in wellness programs.

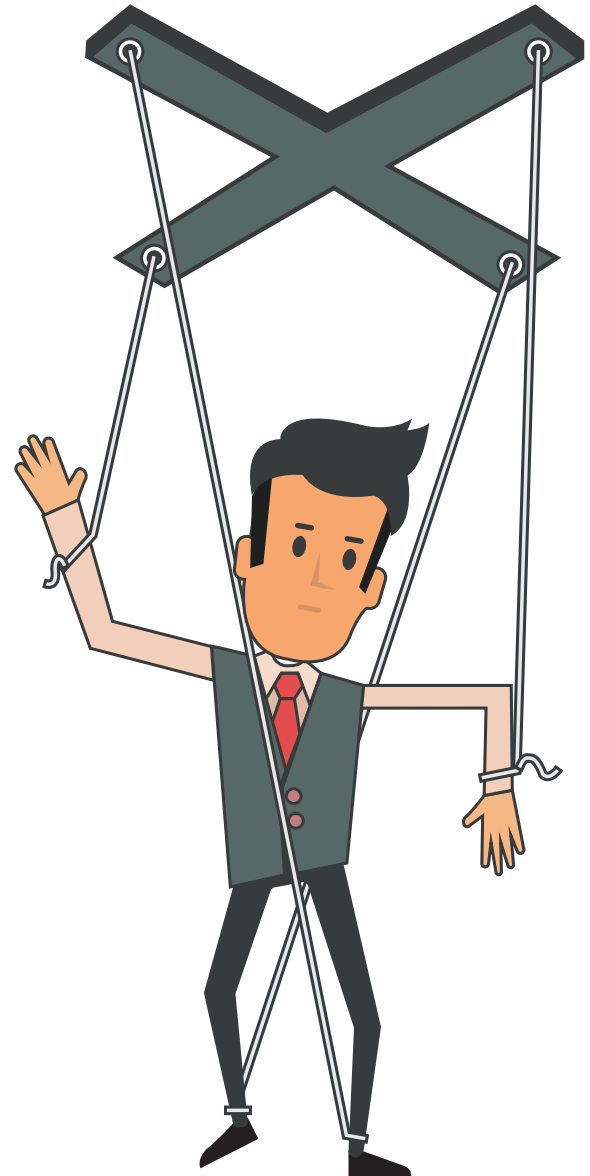
5. TRANSFORMATION POINT #5 – WIRE THE HOUSE (RETHINK CHANGE)

Rethinking change means recognizing that people are complex living systems, capable of and demanding partners, not bosses. We want, and are hardwired, to think for ourselves. Therefore, we need to move away from trying to control people's behaviors and over-relying on incentives (which result in compliance but not commitment – and erode engagement). Instead, we want to look at how we are supporting people in experiencing autonomy, mastery and purpose. We want to support them in being more self-aware and thinking differently – which includes identifying and working through adaptive challenges that they face. Wildly successful companies like the *Firms of Endearment* or *Deliberately Developmental Organizations* do not use any incentives or force their people to do any of their people programs; we can learn a lot from them!

6. TRANSFORMATION POINT #6 – DECORATE THE HOUSE (DEPLOY QUALITY, EVIDENCE-BASED PROGRAMS AND RESOURCES)

You wouldn't think about trying to decorate a house before you even poured a foundation or wired it. But that's what we typically do when it comes to wellness. So much of what we typically do in wellness is not evidence-based, or the evidence of lack of efficacy exists but we do it anyway. For example, if you look at biometric screenings, so many vendors are not following evidence-based guidelines. We're very intentional about never just saying to stop doing something and then not providing a good alternative. There's too much to get into for this interview, but we do outline many alternatives to common outdated wellness program components in our book. For now, we will offer a simple litmus test you can use, examining every program and resource you provide through this test: does it foster autonomy, mastery and purpose? If it does, it's probably a decent program or resource to keep. If one of the three is missing, can that program or resource be tweaked where it can meet all three? If it doesn't, you probably want to consider getting rid of it, unless you want to have unintended consequences of decreased employee engagement, increased stress and others emerge.

“We want, and are hardwired, to think for ourselves. Therefore, we need to move away from trying to control people's behaviors and over-relying on incentives (which result in compliance but not commitment – and erode engagement).”



7. TRANSFORMATION POINT #7 – MAINTAIN THE HOUSE (CONTINUOUS QUALITY IMPROVEMENT)

We look at this step more from a standpoint of continuous quality improvement. You've hopefully decided in Transformation Points #1 and #2 what metrics are most meaningful in guiding your culture journey (i.e., how you'll know if you're going in the right direction or need to course-correct). So using these chosen metrics, create a Wellbeing Dashboard so you can easily review them at various intervals over time. Look for trends and use the data as a good source of feedback rather than an absolute number. This will allow for fluidity and supporting the complex nature of dealing with human beings.

JON ROBISON The way we have this set up is that you don't have to worry about whether you ought to be doing an ROI or VOI anymore. What you want to measure is the gap between where the culture is now and where you want the culture to go. Is that gap narrowing? If that gap is narrowing, that's the measurement you want to look at. There are ways to measure culture and wellness. But I don't know of any tools that focus on *The Fusion* of the two. Now we have a much better, holistic, more contextual big picture view of whether what we're doing is moving the company in the desired direction.

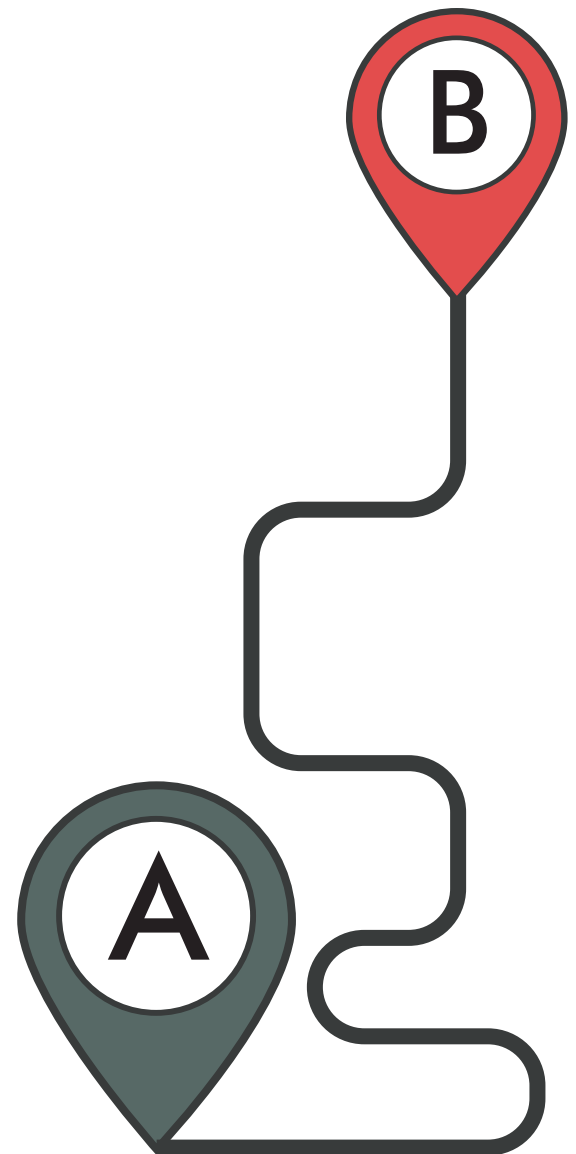
★ **RP** Two points that I think are hard to pull out are, first, is this gap between research and application. The other point is determining best and evidence-based practices. Jon, what are some of these gaps that you've seen between what research says and what might become a popular practice, and what are some evidence-based programs, initiatives and things you've seen that work well?

JON ROBISON I'll start with weight management programs. We have 30 years of definitive, consistent research that says if you offer a weight loss program or a weight management program or a competition, this is what's going to happen. Most of the people will lose weight during the program, most will gain the weight back after the program ends and some will gain back more than they lost. Knowing that, why is it still one of the most popular initiatives being offered? There's a ton of evidence of lack of efficacy and a growing evidence of the atherogenesis.

I would say right now, nobody should be offering a weight loss program, contest or competition anywhere, because we know what the result is going to be. At the very least these initiatives should come with a warning, similar to the warning on a pack of cigarettes:

“The vast majority of people who participate in this program will gain their weight back after the program ends. Some will gain back more than they lose and the resulting weight cycling may be hazardous to their health.”

“What you want to measure is the gap between where the culture is now and where you want the culture to go. Is that gap narrowing? If that gap is narrowing, that's the measurement you want to look at.”



We have some good evidence that if you take a health-centered approach with people rather than a weight-centered approach, and teach people about self-esteem, positive body image, and intuitive/mindful eating, they can find peace with their bodies and their food. And that can help them to be healthier and happier. We've got about 10 randomized control trials looking at this. And we have a program that came out of one of those trials. It's called "Health for Every Body™," and we offer this to companies all over the country.

Perhaps the second biggest issue is incentives. Again we have 30 years of research saying that for behaviors that require even a modicum of thinking and creativity, incentives not only don't produce sustainable change, they actually engender significant iatrogenesis. I always say to people, if you're trying to encourage your employees to get a vaccine, a \$25.00 incentive will increase participation. But, if you're looking at long-term adaptive challenges, like most of the changes we are asking employees to make not only don't they work, but they often make things worse.

I think those two things are really huge. Another point is screening. We are not opposed to screening and knowing numbers, but often when I'm doing my presentations, I'll say "How many of you at your workplace are doing cholesterol screenings?" Everybody raises their hand. And then I'll say "How often are you doing them?" Usually 90% are every six months or every year. And then I'll say "What's the recommendation?" Out of three hundred people, only one or two are going to say it's every three to five years. So why are we doing this every six months? I think those three things from a well-being perspective or a health promotion perspective are majorly problematic.

★ **RP** Anything you would like to add Rosie?

ROSIE WARD We know our field is very much stuck on compliance. When we use incentives and get compliance (i.e., high participation rates), this is communicated as a success; we've seen so many people misuse the term "engagement" and refer to participation and compliance with incentives or penalties as "engagement rates." It is really important that people are paying attention to the actual science when it comes to anything that's impacting people. The other thing I would add is looking at what actually impacts healthcare costs. We cover this in detail in our book, but we know that a really strong healthcare consumerism and literacy strategy can help people better utilize the healthcare system and be much more effective than invasive interventions like biometric screenings.

"It is really important that people are paying attention to the actual science when it comes to anything with incentives or penalties as "engagement rates."

"We have some good evidence that if you take a health-centered approach with people rather than a weight-centered approach, and teach people about self-esteem, positive body image, and intuitive/mindful eating, they can find peace with their bodies and their food."



★ **R P** Let's talk about some tools that you are either familiar with or that you developed yourselves. Tell me about the one specifically that you have developed? What makes it unique, and what are some things that you could uncover using that tool?

ROSIE WARD If you start to research organizational culture surveys, you'll find there's not a lot out there that actually measure culture. One tool that is widely known is the Organizational Culture Assessment Instrument (OCAI or OCI) from Cameron and Quinn. It's less of a survey, and more an instrument that helps to kind of identify what type of culture you have. Another organization, Denison, has their own tool called the Organizational Culture Survey; theirs is primarily looking at behaviors and practices around the OD side. I would say on the health and wellness side there's a lot of environmental audits that some will call a health culture survey. But they're not really measuring culture; they are measuring whether or not your climate supports healthy lifestyle behaviors.

Given our frustration that no tool existed that takes into account *The Fusion*, we created our own tool, the Thriving Workplace Culture Survey™ (TWCS). It's an employee-based survey that takes about ten to twelve minutes to complete. We used best practices when designing this survey and pulled from the literature on individual wellbeing, employee engagement, organizational performance, and leadership effectiveness to create the questions.

The TWCS has five different sections:

1. **ORGANIZATIONAL IDENTITY** – includes questions pertaining to the organization's values and feeling connected to the purpose and mission
2. **LEADERSHIP** – includes questions about the effectiveness of leadership
3. **WORKPLACE CLIMATE** – includes questions about communication, feedback and the work environment (including how well it supports work-life integration and the role of stress)
4. **GROWTH AND DEVELOPMENT** - includes questions regarding how the organization supports personal and professional growth and development
5. **EMPLOYEE WELLBEING** – includes questions on how employees view their role (job, career or calling) and their satisfaction with each of the 6 dimensions of wellbeing.

The design of each section asks people what their desired culture is as it relates to each cultural norm and what the current state is. So we're measuring alignment. And you're getting a snapshot of the current state of work-life integration and stress for your employees as well as where are they at with their individual well-being. You get a score in each of the sections as well as an overall *Cultural Fusion* score (how well your organization is tending to both organizational and employee wellbeing) as well as *Strength of Culture* and *Alignment of Culture* scores.

“Given our frustration that no tool existed that takes into account *The Fusion*, we created our own tool, the Thriving Workplace Culture Survey™ (TWCS). It's an employee-based survey that takes about ten to twelve minutes to complete.”



The other important aspect of the TWCS is the inclusion of qualitative data to provide additional context to the scores. Many survey providers shy away from that or don't do it in an effective way. One of my biggest complaints with most survey tools is that organizations can pay a fee to receive the comments; and they usually are provided as-is. This is problematic; I have seen managers in a dysfunctional culture try to figure out who wrote a specific comment based on how it was written. And that defeats the purpose of providing a confidential survey. So in every single section of our survey there is an opportunity for people to provide comments. However, what we do is conduct a thematic analysis and provide summary data. This allows for benefiting from the richness of the comments while still protecting the confidentiality of the employees, and we feel very strongly about that.

We recommend the survey be done every 18 or 24 months so you can see how you're doing. It's meant to be benchmarked against yourself and used as a tool to guide your ongoing planning journey. We've had various versions of the TWCS over the years; we've tested and retested it and just finished putting it through an aesthetic facelift in terms of the reporting. But the core of it has not changed. We feel it provides a niche to fill a huge gap.

★ **RP** What are some examples of organizations you guys have worked with that really have latched onto this the new paradigm? What have they done to help improve the health and wellness of their employees?

“What's unique about them is that their CEOs all say that their company culture is their main competitive advantage. And it's not just lip-service; they intentionally nurture it and fiercely protect it.”

ROSIE WARD We give a lot of examples in our book. The best practices we've put out there for people are published and anyone can go look at it. We often refer back to the *Firms of Endearment* (FoEs) that I mentioned earlier. There are 28 FoEs identified to date, including familiar companies like Google, Patagonia, New Balance, Panera, Costco and all different types of industry. They've been identified for having a total stakeholder approach to business where they will not sacrifice any of the five major stakeholders for another: employees, shareholders, customers, suppliers, and their community and environments in which they operate. What's unique about them is that their CEOs all say that their company culture is their main competitive advantage. And it's not just lip-service; they intentionally nurture it and fiercely protect it. They will hire and fire based on cultural fit. They also have lots of resources for employee well-being, pay better than average, and invest way more in training and development. They truly are helping employees fuse their personal and professional lives to bring their best selves to work and home each day.

“However, what we do is conduct a thematic analysis and provide summary data. This allows for benefiting from the richness of the comments while still protecting the confidentiality of the employees, and we feel very strongly about that.”



Although none of these specifically use our term, *The Fusion*, they are great examples of it in practice. Another company that we are both in awe of is Barry-Wehmiller. Bob Chapman is their CEO; he published a book earlier this year called *Everybody Matters*, which he co-authored with Raj Sisodia (one of the *Firms of Endearment* authors). They practice what well-known leadership author Simon Sinek calls “truly human leadership” and focus on bringing humanity back to the workplace. In fact, their main metric for success? “We measure success by how we touch the lives of our people.”

The others I would mention are Next Jump, The Decurion Corporation and Bridgewater. They’ve been identified as Deliberately Developmental Organizations (DDOs) by Robert Kegan and colleagues from Harvard. Kegan and colleagues have been studying for years how our thinking gets in the way when dealing with adaptive challenges...and most complex changes have a large adaptive change component where we become uncomfortable and then try to hide our perceived inadequacies, etc. And they posit that organizations waste tons of time and resources due to people being in this space where they can’t truly be themselves – flaws and all - and try to appear perfect, smart, etc. and then don’t necessarily bring their best selves forward due to their own need for self-protection. But DDOs put human development (personal and professional) at the forefront; it’s an expectation that people are working on their own adaptive challenges and the thinking that keeps them stuck, because they know they only grow if their people grow. People truly are supported in developing and becoming the best version of themselves. I mean, THAT’s wellbeing!

And all of these organizations I mentioned are kicking their competition’s butts. So if we want to put a financial argument to it, we need to stop making this about healthcare costs and productivity and start looking at organizational performance. These organizations get it; so that’s what we’re using as a standard and trying to use them as examples with the clients that we work with - whether they’re large or small.

“...both human beings and organizations are living things. And living things don’t operate well under pyramidal hierarchies, they are by their very nature self-managing.”

JON ROBISON The DDO’s are mind blowing. And this hits us right at home because of what we know about the chaos inherent in complex systems, We’ve been looking at organizations and human beings as machines. What we’re realizing now, is that both human beings and organizations are living things. And living things don’t operate well under pyramidal hierarchies, they are by their very nature self-managing. If you look at the multitude of miraculous processes constantly occurring in our brains and our cells, there’s no boss directing them.

So these companies are now flattening themselves out, and to varying degrees doing away with these hierarchies. According to the latest Deloitte survey, the number one item on the table of executives and HR leaders worldwide is

“People truly are supported in developing and becoming the best version of themselves. I mean, THAT’s wellbeing!”




redesigning the organization. And that is why we focus on leadership and the critical importance of culture. Engagement is critical, but there is only so far you can go in that kind of a pyramidal organization. And these organizations, the DOO's and the Firms of Endearment are kicking the butt of everybody else in their space. It doesn't mean everybody is equal, but it is structured so everybody is powerful. The focus of control changes from hierarchies of power to networks of teams.

The hierarchies come and go depending upon the needs of the company at the time. For example, there's a blue collar brass foundry in France called FAVI. The people who work on the floor on the machines make all the decisions: hiring, firing, and buying. There is one story they tell of how they had not had a late delivery of parts in twenty-five years. They had some parts that needed to be delivered, and they were worried that they weren't going to get them to their destination on time. So they hired a helicopter. But it wasn't the CEO who made the decision. It was one of the teams on the floor. They hired a helicopter because they have the right to do that. They flew the parts to the destination, and someone called the CEO and said, "Hey, I've got a helicopter on my front lawn, what the heck is going on here?" The CEO said, "NO worries we wanted to be sure to get your parts to you on time." Talk about promoting autonomy, mastery and purpose!

"It is so clear to us that this is the right direction because organizations in the new business landscape need to be innovative, flexible and quick to respond."

There are quite a few companies moving in this direction. It is so clear to us that this is the right direction because organizations in the new business landscape need to be innovative, flexible and quick to respond. Talk about engagement! How are these people going to feel about a company that lets them make so many of the most important decisions?

ROSIE WARD What we talk about is not just where we think it needs to go; it's already in progress. There's a revolution that's already happening. You're seeing it happening with the different reports that are coming out and the many organizations we can look to as models. We try to remind people that this is where things are going but to understand that doesn't happen overnight, and it doesn't happen without the appropriate culture and trust. 

"It doesn't mean everybody is equal, but it is structured so everybody is powerful. The focus of control changes from hierarchies of power to networks of teams."



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