

conversation

with
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Wellness program administrators may spend months developing a health and wellness strategy only to be disappointed when they fail to see results of any significance, says Brad Cooper, Ph.D., chief executive officer of US Corporate Wellness and co-founder of Catalyst Coaching Institute in Littleton, Colorado. He suggests using a vision-goals-assessment (VGA) approach that begins with developing a clear vision for the wellness program and only then following it with specific goals and assessments. Cooper recently presented the “Employee Wellness Workshop,” which was part of the Art & Science of Health Promotion Virtual Intensive Training Seminar series presented by the International Foundation. He describes the VGA approach.

How can wellness programs develop a vision?

A clear vision is often the missing link before we even get started, both personally and organizationally. It is the key step—typically left out entirely—to success that must come before setting goals. A clear vision drives the goals, both in their initial identification and throughout the journey. Once the vision is clear, the goals will almost set—and achieve—themselves. Take the typical weight-loss resolution of “I’m going to lose 20 pounds.” There is no clear vision in that statement. Instead, there’s only a number, usually pulled out of the air, with a negative term (“lose”) as the centerpiece. Is it any wonder this “resolution” may last only a few weeks at best?

Contrast that with a clear, personal vision of an active, engaged individual who (as a result) has the increased energy to perform better at work, goes hiking with their children or paddleboarding with friends on weekends, and goes to sleep each night knowing that they’re a little closer to that version of their own best selves. The number only *pushes* feelings of guilt on us when falling short. The vision, on the other hand, *pulls* us forward.

Once the vision is clear, the goals become almost automated. The vision shifts our own identity, the way in which we begin to see ourselves. Walking into the break room at work and seeing

leftover birthday cake sitting there is no longer much of a temptation for someone who clearly sees themselves as a healthy, vibrant individual who is making the most out of life. On the other hand, for the person who simply wants to “lose 20 pounds,” it becomes a question of whether the guilt can overcome the desire, a battle that is rarely won over the long term. By the way, the vision approach will likely drive the 20-pound weight loss in the process as a bonus.

The same is true of organizational health and wellness program strategies. Before considering portals, health assessments, lunch and learn approaches, coaching models and other components, what is the clear vision for the organization in the first place? Is it “to reduce the percentage of employees with three or more risk factors by 20%”? If so, that’s not exactly a compelling vision. It is just a number with another negative term (“reduce risk factors”) at the core.

What if, instead, you started with a clear vision? What if the vision was to create a culture of energized, encouraging and high-performing individuals, simultaneously pursuing their individualized journey toward a better tomorrow for themselves, their families and their communities? That sets the stage quite differently. Just like the personal vision, this organizational vision then *pulls* the organization forward, automates the

most effective goals and drives the broader strategy from the inside out. And just like the effect of the clear personal vision on the 20-pound weight loss, the clear organizational vision will very likely reduce the percentage of employees with three or more risk factors more quickly as well.

What kinds of goals can wellness programs set?

While the vision is the critical driver of goals and can dramatically enhance their achievement, setting effective goals still represents one of the cornerstones of the VGA triad. One of the most common gaps involving goals in either the personal or organizational wellness arena is related to the (damaging) “one size fits all” assumption.

In our personal lives, we may fall prey to the New Year’s resolution hype, jumping on board a celebrity’s new book, a friend’s personal journey or the latest headlining fad. These all assume that because a goal is a good fit for you, it’s the same for me. Unfortunately, while science has done a good job of helping us understand what broader groups of people will do, it hasn’t done much to predict how the individual will act. That’s where the “one size fits *one*” approach becomes critical. To optimize your own individual outcomes with any goal, those goals must take into account your history, resources, schedule, support systems, emotions and so much more. If you base your goals on somebody else’s plan, the failure rate goes up exponentially.

The same thing holds true for organizational health and wellness strategies. The traditional approach involves identifying either a singular goal for everyone, like a steps contest, or tapping into a module-based approach to address one of a select number of preidentified individual goals such as weight loss, stress management, healthy eating or exercise. These may look good on a PowerPoint slide and are well-intentioned, but they fall one step short of the “one size fits one” strategy. Just as we saw in the genericized personal pursuits, the failure rate is disappointingly high.

The solution, both personally and organizationally, may be health and wellness coaching. While this has been a part of most employee wellness strategies for almost two decades, it lacked standards. In 2017, the National Board for Health & Wellness Coaching provided specific stan-

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Education

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dards for training, education and scope of practice. Coaching, which was once only a marginal element of any health and wellness program (typically utilized by only 1-3% of employee participants), began playing a more primary role. The combination of enhanced credibility, skillsets and resultant outcomes has opened the eyes of employers on multiple fronts. Employers began seeing higher engagement when tapping into nationally board-certified (but still personalized, relationship-oriented) coaching as a core—rather than a marginal—piece of the strategy.

When utilized effectively, coaching can help tip the scale for individuals and organizations from the “one size fits all” to the “one size fits one.”

On an organizational level, rather than setting the one-size goals around steps taken or pounds lost, employers might consider what would happen if their organizational goal was to have X percent of team members connect personally with a coach over the next three months to discuss (with a skilled professional) what matters most to them and how to move forward toward achieving it? What would those outcomes produce?

What’s the best way to assess whether a wellness program is successful?

Personalization and a focus on lasting, meaningful change are critical, but is the way in which they are brought together actually working? Over the years, I’ve enjoyed endurance sports like marathons, Ironman triathlons and cross-country cycling races. Preparing for these events is much like any other

health and wellness journey, and the training strategies that work for one person may not work as well for another. To determine the value of a specific approach and whether it's having the desired effect, ongoing assessments are integrated into the training plan. For example, for a triathlon, it isn't unusual to schedule a shortened version of the race as an assessment of the training results. Based on the outcome, additional changes can be integrated into the plan. This process allows the athlete to know whether the strategy is working or needs to be adjusted.

Similarly, ongoing assessments play a key role in organizational health and wellness strategies. Assessments can include the traditional improvements in medical claims or risk factors over time. Engagement (not just participation) surveys about the personal impact being realized can also provide an extremely valuable assessment tool. In addition, it is wise to look beyond these and incorporate comparisons of turnover, sick time and even performance measures among participants compared with nonparticipants.

What does performance have to do with health and wellness? Interestingly, some of the latest peer-reviewed research literature is pointing to the positive impact that improved health and wellness can have not only on the categories noted above (e.g., medical claims, risk factors) but also on em-

ployee *performance*. In fact, it may be the single most valuable outcome related to a wellness strategy, and the data now specifically supports this hypothesis. With this component at the forefront, if you are able to incorporate an assessment that captures this valuable piece of the puzzle, you'll likely be encouraged by the results.

However, the goal of the assessment is to determine what additional changes can be implemented. The final piece of the VGA triad is not there to create a stamp of approval. Rather, it is meant to provide the insights necessary to tweak the vision and then continue the process toward continuous improvement over time.

There is one very important caveat to this, depending on the assessment(s) being utilized. It will take time to make those improvements. As such, it is necessary to include a variety of assessments in this process. For example, engagement surveys can effectively demonstrate positive changes within the initial six to 12 months, while measurable shifts in risk factors may take years. However, the new habits (and resultant performance enhancements noted above) will show up much earlier with the right assessment process. Just like with the vision and goals, there is no cookie-cutter approach to the assessment.

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