Connecting the Dots: Integrating Work/Life and Health

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GOALS

- Identify “Culture of Health” as a foundation for organizational and individual performance.
- History of work/life and health integration
- Present an overview of Prudential’s research/data trends.
- Discuss guiding principles for our organizational culture development efforts.
- Provide an overview of leadership development programs that emphasize Work/Life effectiveness.
BACKGROUND ON PRUDENTIAL

• Prudential Financial, Inc. (NYSE: PRU), a financial services leader with more than $1.1 trillion of assets under management as of December 31, 2013

• Founded over 135 years ago.

• Has operations in the United States, Asia, Europe, and Latin America

• Employees: 20,000 in the United States, 51,000 worldwide

• Products and services include life insurance, annuities, retirement-related services, mutual funds and investment management.
Health & Wellness supports individual & organizational health…
DIMENSIONS OF HEALTH

Physical
- Optimizing physical activity, eating a nutritious diet, getting adequate rest
- Completing prescribed screenings, preventive care, and making other positive lifestyle changes

Emotional
- Experiencing joy, enthusiasm for life and work and an ability to focus one's attention and energy
- Meeting challenges with optimism, creativity, and the drive for success

Social
- Connecting with others in ways that bring mutual respect, support and fulfillment
- Spending adequate time in the company of family and loved ones

Spiritual
- Experiencing meaning and purpose that makes you part of something larger than yourself
- Having positive morals, values and ethics

Financial
- Understanding and managing finances to meet short/long term goals
- Creating an experience of success, abundance, and opportunities for giving to self and others
# LEADERSHIP BEHAVIORS

<table>
<thead>
<tr>
<th>Physical</th>
<th>• Remind team members to use available resources for measuring and improving their health. Encourage ees to move more, consider standing/walking meetings. Provide nutritious food at events/meetings. Encourage reasonable work hours, effective distribution of workload, and use of vacation. Bring medical/wellness concerns that arise in the workplace to appropriate personnel.</th>
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</thead>
<tbody>
<tr>
<td>Emotional</td>
<td>• Know your team members and refer them to available resources when performance or personal concerns arise. Greet ees each morning. Acknowledge accomplishments freely. Listen more than you talk; say “yes, and” rather than “yes, but.” Be a trustworthy, accessible advisor. Support intelligent risk taking and mistakes as learning experiences rather than failures. Believe in the competence of others, be supportive, and expect their success.</td>
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<tr>
<td>Social</td>
<td>• Pay attention to how group members interact. Identify conflict and tension early on and intervene as needed. Promote safe and respectful collaboration, using available consultative resources as needed. Encourage engagement in both work and life activities outside work. Show a respectful interest in ee’s lives. Be supportive when ees mention conflicting work and life demands. Encourage understanding and use of work/life resources.</td>
</tr>
<tr>
<td>Spiritual</td>
<td>• Discuss your group’s purpose and refer to the company’s values regularly. Help team members understand how their function contributes to the overall mission of the organization. Share your own sense of professional purpose and related values and encourage team members to do the same. Validate the worth of what they offer. Communicate frequently and effectively; share the &quot;why&quot; behind changes and do so often. Check in regularly on the progress of work assignments; provide guidance on priorities and due dates as needed.</td>
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<tr>
<td>Financial</td>
<td>• Encourage understanding of the company’s savings plans and the value of thoughtful money management for individual/family security and peace of mind. Remind team members who mention personal financial difficulties of available resources</td>
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</table>
...with programs and services that promote healthy behavior.
HISTORY OF WORK/LIFE & HEALTH INTEGRATION

- 2001 moved work/life out of Policy area and into cross-functional Health & Wellness & Diversity Work/Life team
  - Split between vendor management and strategy
- Redefined health broadly in line with WHO
- Created VP, Health, Life & Inclusion within Health & Wellness
- Added work/life questions to the WebMD Health Risk Assessment to enable measurement of risk
- Created coordinated health & work/life communication plan – we never spoke of one without the other again
  - Created new ways to communicate: Ask the Health Guys, Commit to a Healthier 20XX, Health Cams, PruTubes, Digital Signage, Annual Enrollment, Co-wide Health Summits, Vendor Summits, embedded concepts in training, 100 Years of Health.
- Telecommuting research – connecting health risk and AWAs
- Health Data
TELECOMMUTING AND HEALTH RESEARCH

- **Purpose:** Investigate the influence of telecommuting on employee health.

- **Hypothesis:** Working from home will have a positive impact on health indicators, because it empowers employees to make decisions that are right for them and reduces the time and stress associated with commuting. We expect that the number of days spent telecommuting will impact the results. Specifically, we hypothesize that employees that work from the office a majority of the time but take advantage of flexibility occasionally will have the greatest health benefits.

- **Methods:** Employee demographic data, medical claims, WebMD Health Risk Assessment data, and remote connectivity hours were examined for Prudential Financial employees from 2010 to 2011.

- **Health risks** were determined for nontelecommuters and telecommuters working ≤8, 9–32, 33–72, and ≥73 hours per month. Longitudinal models for each health risk were estimated, controlling for demographic and job characteristics.
OPTIMIZING HUMAN CAPACITY & LEADERSHIP ESSENTIALS

• Genesis of programs

• 4 years, 4 businesses and 1400 leaders

• Overview of content
Optimizing Human Capacity

Work Life

High level skills, knowledge, ability.

Highest possible degree of personal control.

Flexibility.

Minimized overload.

Empowering resources.

Non-Work Life
Human Capacity Challenges

- Illness
- Disability
- Personal Problem
- Family Issue
- Inadequate Skills, Knowledge, Ability
- Organizational Change
- Work Overload
- Troubling Workplace Situation
- Unhealthy/Negative Organizational Climate
REMEDYING HUMAN CAPACITY CHALLENGES

**Work Life**
- Illness
- Disability
- Personal Problem
- Family Issue
- Inadequate Skills, Knowledge, Ability
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- Unhealthy/Negative Org Climate

**Non-Work Life**
- HW, Benefit Plans, IDMU

**Mgt, HR, Learning, IOT**
OPTIMIZING HUMAN CAPACITY

Case Examples & Discussion
OPTIMIZING HUMAN CAPACITY: Healthy Team Members Benefit You & Your Business

**Optimal Health**
- Physically Energized
- Emotionally Connected
- Mentally Focused
- Spiritually Fulfilled

**Business Benefits**
- Stamina
- Collaboration
- Strategic Judgment
- Commitment/Engagement
OPTIMIZING HUMAN CAPACITY

- What will you do differently?
- Who will help you keep at it?
- What benefits will be evident one month from now?
STATE OF THE COMPANY’S HEALTH:  
How are We Doing?  The HQ Score

- Health Quotient (HQ) aggregated results.  
- Based on modifiable lifestyle and health behaviors.  
- Growth with room for improvement.
## STATE OF THE COMPANY’S HEALTH:
### Health Risk and Associated Costs

<table>
<thead>
<tr>
<th>HQ Risk Level *</th>
<th>PMPY Net Payments Medical and Drug Costs</th>
<th>ER Visits per 1000</th>
<th>Hospital Admits per 1000</th>
<th>Short Term Disability Cases per 100</th>
<th>Short Term Disability Days Lost per 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low HQ Risk</td>
<td>$3,689</td>
<td>121</td>
<td>34</td>
<td>5.7</td>
<td>175</td>
</tr>
<tr>
<td>Moderate HQ Risk</td>
<td>$7,782</td>
<td>234</td>
<td>84</td>
<td>17.1</td>
<td>541</td>
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<tr>
<td>High HQ Risk</td>
<td>$11,726</td>
<td>321</td>
<td>110</td>
<td>25.9</td>
<td>1006</td>
</tr>
<tr>
<td>Overall HQ Participants</td>
<td>$4,391</td>
<td>140</td>
<td>42</td>
<td>7.5</td>
<td>238</td>
</tr>
<tr>
<td>NonHQ Participants</td>
<td>$5,399</td>
<td>156</td>
<td>66</td>
<td>10.6</td>
<td>498</td>
</tr>
</tbody>
</table>

### NOTES:
- PMPY Net Payments Costs is the cost to Prudential and does not include employee out-of-pocket costs.
- ER Visits per 1000 are ambulatory care visits only and excludes ER visits that resulted in an admission.
- Short Term Disability includes Maternity cases.

*based on total modifiable health risk factors for each person:
- Low-risk: 0 to 2 risks.
- Medium-risk: 3 to 4 risks.
- High-risk: 5 or more risks.
STATE OF THE COMPANY’S HEALTH: How are We Doing? Net Change in Risk

Prudential’s Risk Profile

2009 2010 2011 2012 2013

85.2% low risk = 9.5% reduction in 4 years
INFLUENCING CULTURES: Some Guiding Principles

- Communicate relentlessly

- Practice vigilant (and shameless) opportunism

- Activate cross-functional partnerships: HR/Talent, Diversity, Ethics, Security, Business Resource Groups, business leaders, external partners (e.g., research partners, Rutgers)

- Build on available tools: Health Risk Assessment, Leadership Competencies, Crucial Conversations
“When I was 5 years old, my mother always told me that happiness was the key to life. When I went to school, they asked me what I wanted to be when I grew up. I wrote down ‘happy’. They told me I didn’t understand the assignment, and I told them they didn’t understand life.”

- John Lennon
QUESTIONS?