



**Validation**Institute

# 2024 Validation Report

**Review for: Cleo**

**Validation Achieved: Metrics**

**Valid through: July 2025**

# Company Profile

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<b>Category:</b>	<b>Mental Health</b>
<b>Website:</b>	<a href="https://hicleo.com/">https://hicleo.com/</a>
<b>Public or Private:</b>	Private
<b>Year Established:</b>	2016
<b>CEO:</b>	Madhavi Vemireddy, MD
<b>Company contact:</b>	<a href="https://get.hicleo.com/contact-us.html">https://get.hicleo.com/contact-us.html</a>

## Description provided by the company:

**Cleo** is the only global, end-to-end, comprehensive family care platform supporting individuals throughout every life stage. Whether they are growing their family; raising babies, children, or teenagers; caring for an adult loved one; or taking care of their own health, **Cleo** provides virtual coaching, concierge support and navigation to resources and benefits so that they can be happier and healthier both at home and at work. **Cleo's** expert global Guide network combined with advanced analytics and a personalized digital platform supports members in more than 70 countries around the world through 17+ languages spoken by our **Cleo** Guides with an additional 250+ live translated languages. Cleo delivers evidenced based interventions to improve the health & wellbeing of the family unit, decrease caregiver burnout, increase productivity, and reduce healthcare spend. **Cleo** is trusted by more than 200 employers. Learn more at [hicleo.com](https://hicleo.com).

# Claim Assertion for Validation

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Cleo's Family Health Index (FHI)<sup>™</sup> accurately measures participants' health and assesses their need for support for parenting and caregiving.

The Family Health Index score also reflects (correlates to) the person's work productivity. This allows Cleo to work with the person to prevent or reduce time lost due to parenting or caregiving.

Higher risk members who engage with Cleo improve their total Family Health Index and Emotional Wellness scores.

The analysis gives an evidence-based estimate of Cleo's emotional wellness support impact on medical costs

# Program Description

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Through a global family care platform, Cleo supports families across every stage of parenting and caregiving to achieve better health outcomes for the caregiver and their loved ones. Cleo helps parents and caregivers access high quality care, promotes healthy behaviors, and intervenes with expert guidance at critical moments in the parenting and caregiving journey to help them better balance family, health, and work.

Every family is matched with a Cleo Guide, a health and caregiving expert, who stays with them for their entire journey providing personalized advice and support on all relevant topics across health, parenting, caregiving, relationships, and career. Cleo uses advanced analytics and evidence-based digital pathways called LifePaths<sup>SM</sup> to support members through their caregiving experience. For members these include, but are not limited to, emotional wellness support, age and condition-specific parenting and caregiving support, and guidance related to long-term care planning.

Using the Family Health Index, a multi-dimensional analytics tool, each member is assessed for their risk of burnout, mental health strain and social isolation, and supported with targeted digital and human led expert interventions to drive proactive family-centered care.

Employees and their partners use Cleo's family care platform to message and connect live with their Guide and other specialists, access to curated support plans for every member of the family, virtual group workshops and support groups with other Cleo families and take ongoing assessments, including the Family Health Index, to track evolving needs and the risk profile of the family



# Method / Calculation / Examples

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## Family Health Index Survey

The Family Health Index covers seven areas:

- Confidence
- Self-care
- Connectedness
- Family support
- Caregiving balance / burden
- General health (from the Short Form 36 (Ware, 1992))
- Emotional wellness [Patient Health Questionnaire from the Short Form 36 – 4/ PHQ-4 (Löwe B, 2010)]

The General Health and Emotional Wellness questions come from validated surveys (sources shown); these questions have been tested to bring consistent, reliable responses.





# Method / Calculation / Examples

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Analysis was done to assess how closely scores in the first five areas (non-validated questions) tracked to the general health and emotional wellness scores. A strong link would support confidence in the Family Health Index as an accurate measurement.

## **Lost Work Time (Productivity)**

In addition to the Family Health Index, participants also answer questions about how much work time they missed in the past four weeks and their ability to concentrate due to family or caregiving demands. The Family Health Index score was compared (correlated) to the lost work time.

## **Improvement of Family Health Index Score**

### Improvement of Family Health Index Score with Engagement

Initial and follow-up total Family Health Index scores of participants initially 'at risk' (less than 45 on a scale of 20 to 70 possible) were compared, and the percentage of scores improved, worsened, and remaining unchanged were reported.



# Method / Calculation / Examples

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## **Emotional Wellness - Depression & Anxiety**

Untreated depression and anxiety have been shown to be linked to higher medical costs. The analysis examines two Cleo groups – those in and those not in the Pregnancy and Baby LifePath who answered the four Emotional Wellness questions on two occasions. The number of people who had complete data in the Pregnancy and Baby LifePath was 325. The number of other parents and caregivers not in this LifePath was 363.

For each group, the analysis tracks their starting and ending Emotional Wellness Scores and their average estimated medical costs. Scores were categorized as Normal (0 – 2), Mild (3 – 5), Moderate (6 – 8) or Severe (9 – 12). Estimated medical costs for no, mild/moderate, and severe depression are drawn from four published studies. (Lerner D, 2017) (NSC employer cost calculator: Mental Health, 2024) (Happify Health, 2022) (Luca, 2020).

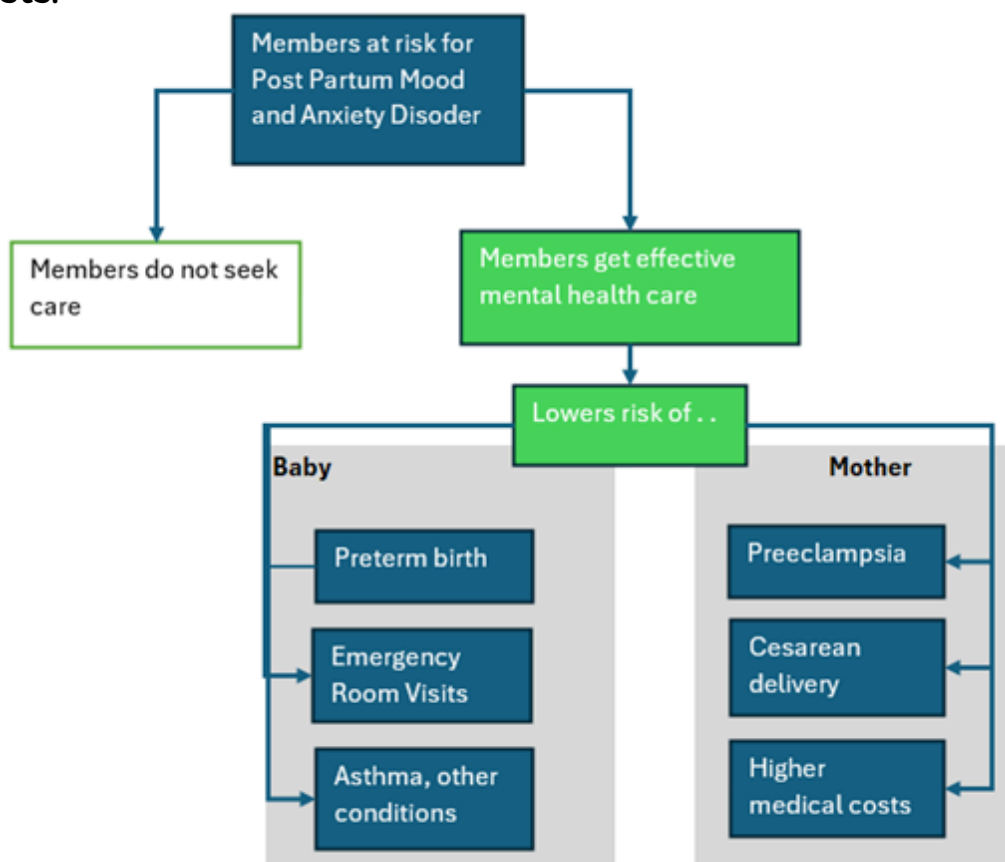
Savings were calculated by taking the estimated medical costs for the initial risk category (mild, severe, etc.) and subtracting the estimated medical costs for the risk category at follow-up. When a participant moved to a lower risk category, savings were positive; moving to a higher risk category was a cost increase.

# Method / Calculation / Examples

For both groups, these costs were reduced by 25% since members are likely to join Cleo after they have had some medical costs for their symptoms.

## Pregnancy & Baby Emotional Wellness

See Graph 1 for a summary of the benefits of effective mental health treatment for peripartum mood and anxiety disorder (PMAD). By bringing mental health services to members whose Emotional Wellness Score shows risk for PMAD, Cleo helps plans to have fewer members at risk for high medical costs.



Graph 1: Selected Benefits of peripartum mood and anxiety disorder (PMAD)



# Findings & Validation

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## **Family Health Index Survey**

The Family Health Index score for the five topic areas (where the questions had not been studied/validated) strongly tracked to the General Health and Emotional Wellness topics (validated questions). This supports the Family Health Index's accuracy to measure health and wellbeing.

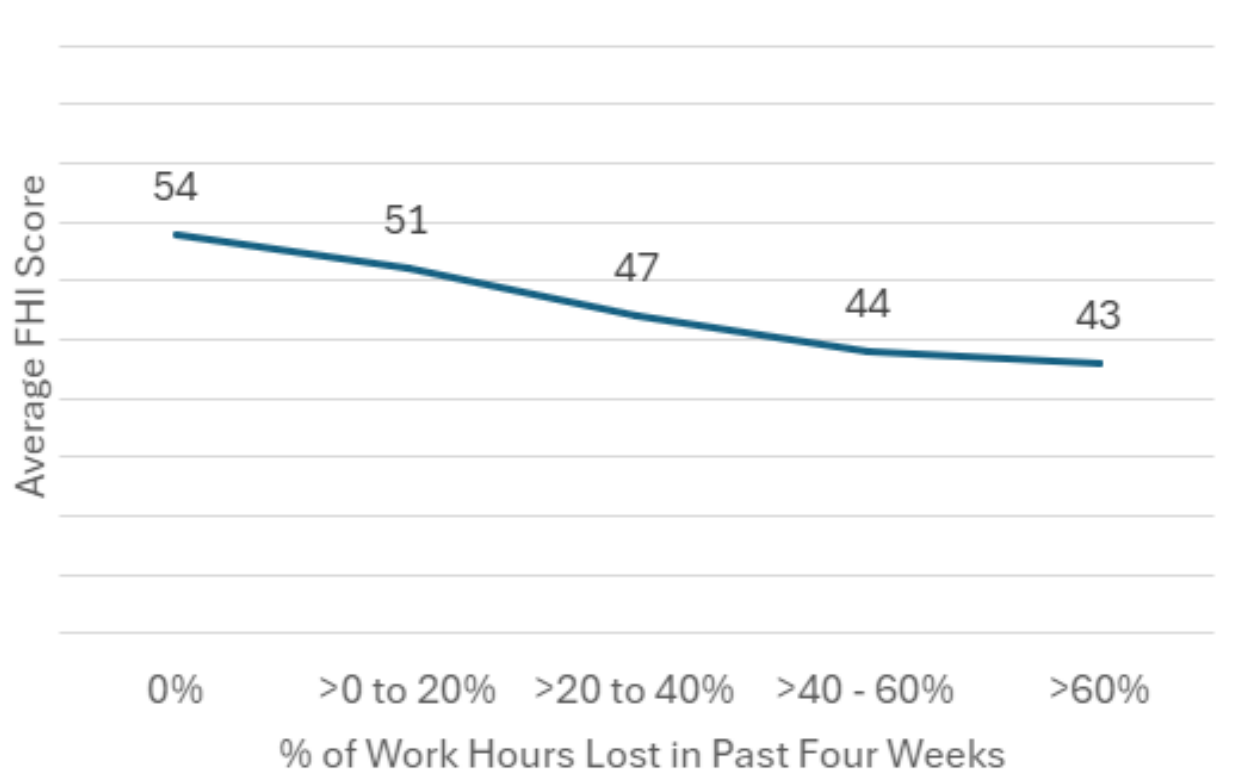
## **Lost Work Time (Productivity)**

The graph below shows the average Family Health Index scores for people reporting 0% time lost from work, more than 0% but less than 20%, etc. The average Family Health Index score was 54 for people reporting they had zero time lost from work due to caregiving. People whose Family Health Index score was 20% lower (43) reported losing more than 60% of their work time (Note: participants who lost 80% or more were not included.)

The Family Health Index score links (correlates) to work and productivity time lost ( $p < .0001$  and  $r = -0.41$ ). Those with less time missed from work had on average higher Family Health Index scores.



# Findings & Validation



Graph 2: Lost Time from Work and Average Family Health Index scores

The analysis focuses on a single point in time. Whether a person gains work time or productivity as the Family Health Index score improves is not known at this time.



# Findings & Validation

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## **Improvement of Family Health Index Score**

Among 112 high-risk members (Family Health Index composite score of 45 or less, from possible scores of 20-70), 69% had a higher Family Health Index composite score at follow-up 6 months later.

In a separate analysis of 861 members who completed a PHQ-4 (an integral dimension of the FHI), 41.9 % had some level of risk for Emotional Wellness impairment (PHQ-4 score  $\geq 3$ , on a 0-12 scale). At follow-up, 56.8% of those at risk had improved their scores.

## **Pregnancy and Baby Emotional Wellness**

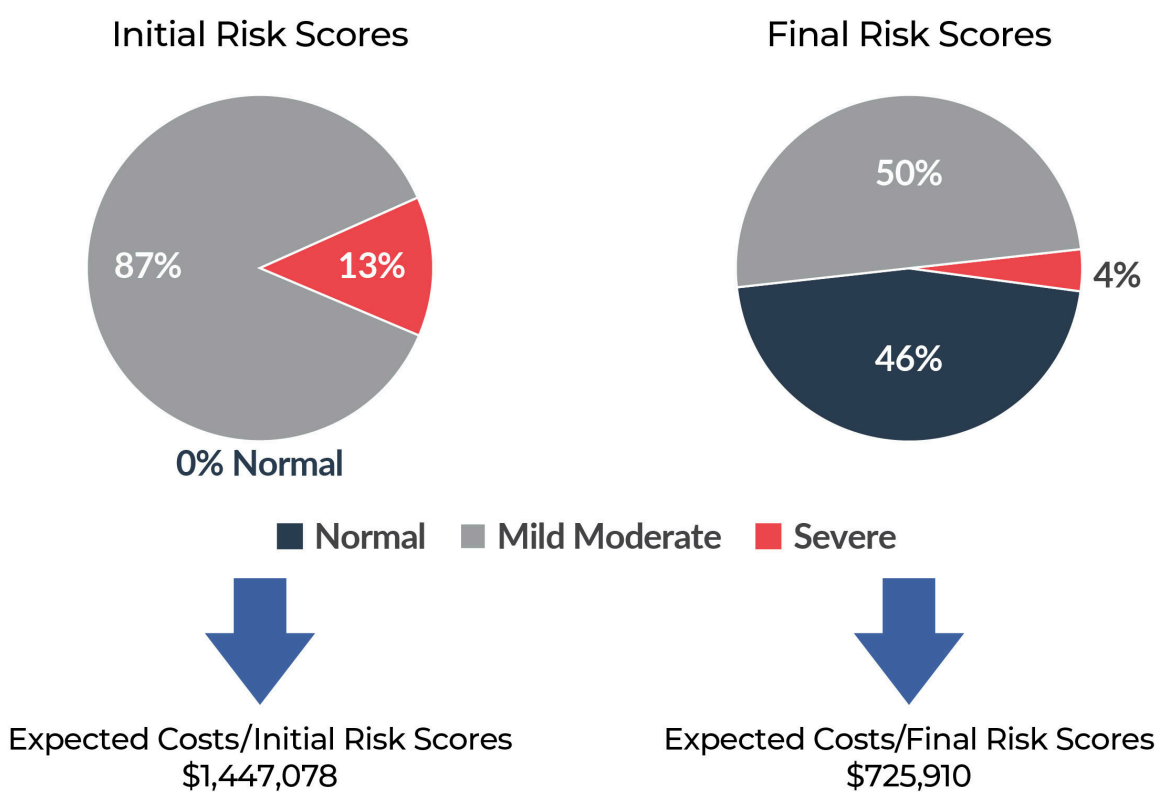
Of 325 people in the Pregnancy and Baby Life Path, with initial and follow-up assessments, 142 had initial Emotional Wellness scores showing mild, moderate, or severe risk.

Figure 1 on page 12 shows the initial and final risk levels based upon Emotional Wellness Scores and the expected medical costs. Estimated savings averaged \$5,079 per member.



# Findings & Validation

Figure 1: Initial and Final Risk Levels and Estimated Expected Medical Costs for Pregnancy and Baby LifePath Members



**Savings = \$721,168 / \$5,079 per member**

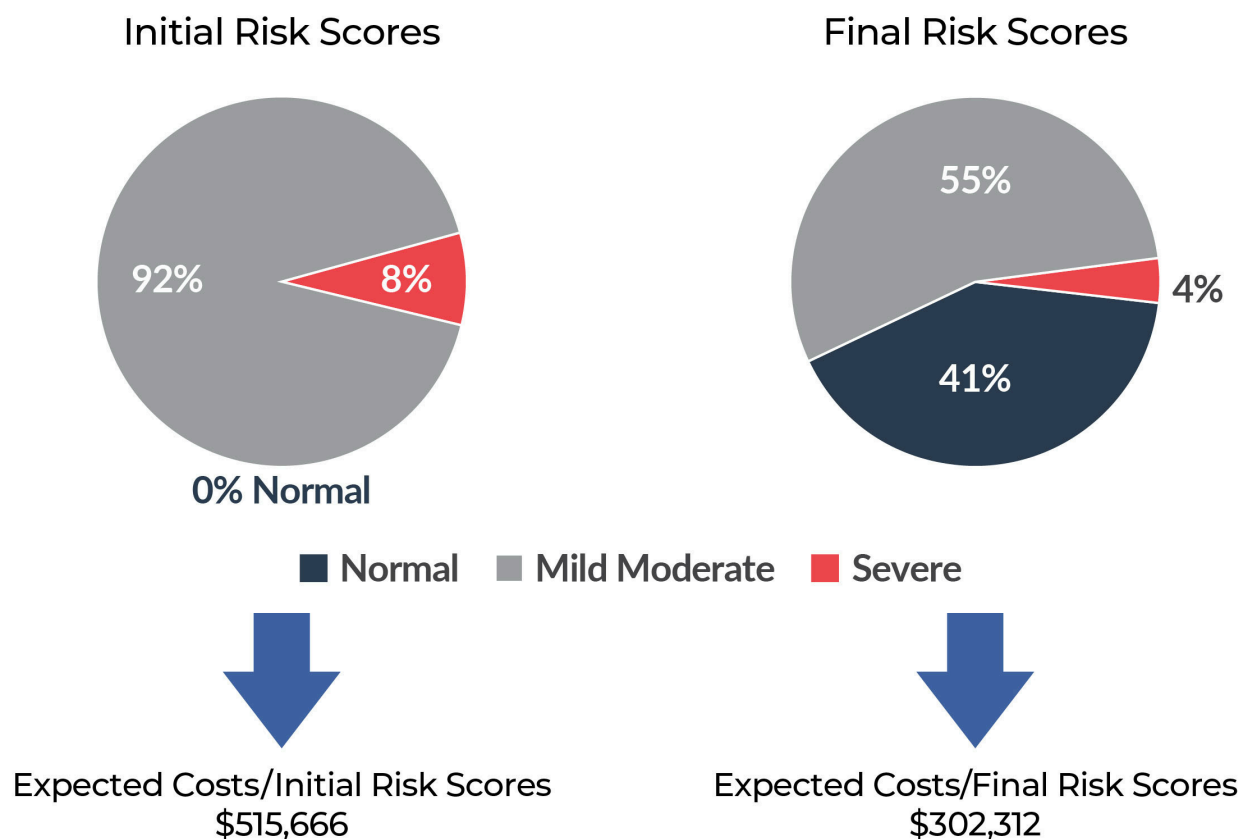


# Findings & Validation

## Other Emotional Wellness Participants (non-Maternity)

Of 363 people not in the Pregnancy and Baby LifePath, 165 had initial Emotional Wellness scores showing mild, moderate, or severe risk. Figure 2 shows the initial and final risk levels based upon Emotional Wellness Scores and expected medical costs. Estimated savings averaged \$1,293 per member

Figure 2: Initial and final Risk Levels Based Upon Emotional Wellness Scores and Expected Medical Costs



**Savings = \$213,354 / \$1,293 per member**

# Limitations

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The analysis focuses on people who voluntarily enrolled and took part in the Cleo family care platform. Such people may have traits that make them more likely to succeed and/or to have lower medical costs even without Cleo.

The correlation between Family Health Index scores and lost work time was present but would be considered weak by experts.

## Works Cited

Happify Health. (2022). Economic Burden of the 'Silent' Health Epidemic. Retrieved from [https://f.hubspotusercontent30.net/hubfs/6709186/Content%20offers/Economic\\_Burden\\_of\\_Silent\\_Mental\\_Health\\_Dilemma\\_2.pdf](https://f.hubspotusercontent30.net/hubfs/6709186/Content%20offers/Economic_Burden_of_Silent_Mental_Health_Dilemma_2.pdf)

Lerner D, L. M. (2017). The high cost of mental disorders: Facts for employers. Tufts Medical Center Program on Health, Work, and Productivity.

Löwe B, W. I. (2010). A 4-item measure of depression and anxiety: validation and standardization of the Patient Health Questionnaire-4 (PHQ-4) in the general population. J Affect Disord, 86-95.

Luca, D. a. (2020). Financial toll of untreated perinatal mood and anxiety disorders among 2017 births in the United States. Am J Public Health, e1-e9.

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Ware, J. J. (1992). The MOS 36-Item Short-Form Health Survey (SF-36): I. Conceptual Framework and Item Selection. Medical Care.

# Validation and Credibility Guarantee

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**Cleo** achieved validation for **Cleo Parenting and Caregiving**.

Validation Institute is willing to provide up to a \$100,000 guarantee as part of their Credibility Guarantee Program. To learn more, visit <https://validationinstitute.com/credibility-guarantee/>.

☐ **Savings**

Can reduce health care spending per case/participant or for the plan/purchaser overall.

☐ **Outcomes**

Product/solution has measurably improved an outcome (risk, hba1c, events, employee retention, etc.) of importance.

☒ **Metrics**

Credible sources and valid assumptions create a reasonable estimate of a program's impact.

☐ **Contractual Integrity**

Vendor is willing to put a part of their fees "at risk" as a guarantee.

# CERTIFICATE OF VALIDATION

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**Applicant:**

**Cleo**

548 Market St

San Francisco, California 94104, US

**Product:**

Cleo Parenting and Caregiving

**Claim:**

Cleo's Family Health Index (FHI) accurately measures participants' health and assesses their need for support for parenting and caregiving. The Family Health Index score also reflects (correlates to) the person's work productivity. Higher risk members who engage with Cleo improve their total Family Health Index and Emotional Wellness scores. The analysis gives an evidence-based estimate of Cleo's emotional wellness support impact on medical costs

**Validation Achieved:**

**Validated for Metrics**

**Validation Award Date:**

July 2024



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**Linda K. Riddell, MS**  
**Chief Data Scientist**  
**Validation Institute**



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**Vidar Jorgensen**  
**Chief Executive Officer**  
**Validation Institute**





# About Validation Institute

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**Validation Institute** is a professional community that advocates for organizations and approaches that deliver better health value - stronger health outcomes at lower cost. We connect, train, and certify health care purchasers, and we validate and connect providers delivering superior results. Founded in 2014, the mission of the organization has consistently been to help provide transparency to buyers of health care.

## Validation Review Process

Validation Institute has a team of epidemiologists and statisticians who review each program. The team focuses on three components:

- Evidence from published literature that a similar intervention had similar results.
- The reliability and credibility of the data sources.
- The rigor of the approach to calculating results.

To achieve validation, the program has to satisfy each of these components. VI's team then summarizes the review into a report which is publicly available. Details of VI's review are available with the program's permission.