



## ISU WELLBEING

Action Plan  
November 2015

# ISU WELLBEING

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## EXECUTIVE SUMMARY

The following strategic plan details the proposed *ISU WellBeing* philosophy, priorities, and action plan for the next 3-5 years.

*ISU's WellBeing* philosophy takes a pioneering view on worksite wellness that integrates wellness, work-life, organizational effectiveness, and leadership at the individual and institutional perspectives. There are five guiding principles for the *ISU WellBeing* philosophy. They are: 1) Create the conditions in which well-being thrives, 2) Build an environment that makes the healthy choice the easy choice, 3) Support people from a “whole is greater than the sum of its parts” philosophy, 4) Recognize the importance and value of all elements of well-being, and 5) Develop human capacity for growth and development.

While several models for worksite wellness programs exist, the model for *ISU WellBeing* revolves around six main elements: mental (mind), physical (body), spiritual (spirit), emotional, financial, and community. As we focus on creating the conditions for a culture of well-being in which people can bring their best self every day to work, learn and grow, we stay rooted in these six elements across the organization, creating a synergy between individual and institutional well-being.

The action plan, consisting of five strategic priorities resulted from the comprehensive campus inventory conducted during 2014. The review included broad ranging data from health claims, campus conversations, surveys, and work previously conducted by Sibson Consulting. The following priorities create the foundation for a sustainable and impactful culture of well-being at Iowa State University.

- Improve the health status of our employees.
- Enable employees to adopt and maintain healthy lifestyle choices.
- Create a safe and supportive environment that makes healthy choices easy.
- Educate and empower our employees to effectively manage and utilize the health care system.
- Foster an inclusive and engaging culture of well-being that enables employees to bring their best self to work and life every day.

The plan consists of a phased implementation with opportunity to adapt as conditions and needs change. The phases include building the infrastructure for success, integrating with current health and well-being services, and leveraging partnerships and collaboration across campus, the Ames community, and the state of Iowa.

The following report has five sections: Pioneering a New Era in Well-being, An Inventory of Well-being at ISU, *ISU WellBeing* Strategic Priorities, Cultivating *ISU WellBeing*, and Investing in *ISU WellBeing*.

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## PIONEERING A NEW ERA IN WELL-BEING

The wellness landscape over the last several decades has, like many fields today, evolved and transformed with our ever changing world. This evolution has taken many different forms over time, from focusing on physical health, to reducing health care costs, to providing a return on investment, to our current destination of culture as a competitive advantage. The new focus on culture requires a more expansive perspective and looks at the individual, the individual within the context of the organization, the organization as a system, and all the interdependent moving parts associated with this dynamic. In this new landscape, the “culture of health and/or wellness” is now replaced by a call for a **“thriving culture of well-being”**. While these two concepts may sound similar, the two have very different meanings. In fact, this new understanding of well-being will require a fundamental paradigm shift in how wellness is done at the worksite.

This shift requires a “new normal” for worksites that involves re-creating the fundamental design of everything we offer through wellness and creates a new understanding of “well-being” through the lense of organizational development. The organizational development view aligns well-being with the institution’s vision, values, and purpose. ***As a university committed to improving the quality of life for our students and the world we are uniquely positioned to cultivate the employee experience and create a great place to work.***

To build this thriving culture of well-being, new thinking is called upon, much like Albert Einstein stated, “We cannot solve the challenges of today with the same thinking that created them”. To do this, we start with the guiding principles that define our thinking today and provide clarity for a better tomorrow.

*“We cannot solve the challenges of today with the same thinking that created them.”*

*Albert Einstein*

### Guiding principles of the new era:

#### 1. Create conditions in which well-being thrives.

Instead of incentive-based programming to increase participation, we put the focus on creating the conditions where a thriving culture based on core values and purpose will further the mission of the institution. The wellness programming then aligns with the institutional priorities by supporting the well-being of all employees in their work and life.

#### 2. Build an environment that makes healthy choices an easy choice.

Much like the “frog in boiling water” we too have adapted to fit our environments and we don’t even realize how it is impacting us. Our focus should not be on changing people’s behavior through programming that can’t be sustained in today’s environment, but in designing a built environment that supports both individual and institutional well-being. These environmental changes should not be a separate wellness initiative, isolated and/or siloed on its own, but one that is aligned to the mission and purpose of the institution, strategically positioned to provide sustainability.

#### 3. Support people from a “whole is greater than the sum of its parts” philosophy.

We know from quantum physics and the neurosciences of today that the world is an interconnected, complex, living organism that cannot be looked at separate from its system. Through this, we have come to understand that the whole is actually greater than the sum of its parts, not equal to the sum of its parts. This shift in thinking leads us to look more at culture than just strategy and programming, and shift from a place of “rewarding to motivate” to one that values the inherent motivation one has when working with a sense of purpose and connection, especially with complex processes and tasks.

#### **4. Recognize the importance and value of all elements of well-being.**

In worksite wellness today there is a belief that if we make everyone physically healthy all will be well. This may be one of the hardest perspectives to shift. While physical health is foundational to being well, people can flourish even if they have disease or illness. This will require a move away from the “jogging and broccoli” mentality to one that truly values and supports overall well-being; not in the absence of disease, but in its presence too! Other elements such as emotional, mental, spiritual, financial and community have a tremendous impact on individual well-being. This involves shifting from making health all about biometrics and numbers to recognizing that optimal well-being is dynamic. It evolves from the human experience and requires constant change and adaptation.

#### **5. Develop human capacity for growth and development.**

With recent breakthroughs in epigenetics, we now know there is much we can do to change or modify our genetics. We also realize the impact our thinking, our beliefs, and our perceptions have on our well-being. Going forward, wellness needs to serve people from their uniqueness and individuality, helping them understand the thinking behind their choices, and in doing so, provide for better, more informed choices that can unfold from moment to moment with the human experience.

In order ***to create these conditions in which well-being and healthy lifestyles can thrive***, we will need to look at the core of how we design and communicate programs and services and how we work with people. Our model of well-being will need to expand to encompass the uniqueness of ISU. We will want to give people the skills for constant change – to help employees help themselves, and enable each person to be an advocate for him/herself. We will advance ISU’s culture as a great place to work and learn and where every person may bring his/her best self to work and life.

## THE SHIFTING PARADIGM

In this culture of well-being, our experiences create the opportunity for continuous learning and growth. In the table below are examples of the shifts from the “fix it” activity found within traditional wellness programming to the new model of a thriving culture of well-being.

| <b>Traditional Wellness Programming</b> | <b>NEW Paradigm of Well-being</b>  |
|---|--|
| Weight Loss program                     | <b>Normal Eating (intuitive/mindful)</b><br><b>Size Acceptance (Healthy at Any Size, HAES®)</b>  |
| Fitness/Pedometer program               | <b>Natural Movement</b><br><b>Every Day Fitness (9-5)</b><br><b>Walking clubs</b>  |
| Stress Management program               | <b>Well-being Series with a focus on purpose, resiliency, energy management, and mindfulness</b>   |
| Behavior Change programs                | <b>Built Environment that includes biofeedback rooms, walking paths, sit/stand desks, and biking/walking routes</b>  |
| Personal Responsibility                 | <b>Self-Leadership and intentionality (ownership)</b><br><b>Leadership development – focus on valuing people talent</b><br><b>Sustainability – greater awareness of impact of health decisions</b> |
| Health Coach                            | <b>Well-being Coach – focusing on all elements of well-being and a “whole &gt; sum of its parts” philosophy</b>  |
| Health Risk Assessment                  | <b>Partnership with local health providers; encourage medical homes and preventive care</b>  |
| Health Care Claims                      | <b>Health Care Consumerism – education and advocacy</b><br><b>Engaged, creative and inspired employees</b>   |

Bottom line, when we focus on the person, align with purpose and passion, and cultivate the conditions; we create the potential for a new well-being paradigm at Iowa State University.

## A FRAMEWORK FOR ISU WELLBEING

Several models exist for well-being. There is the Six Dimensions of Wellness developed by Bill Hettler in 1976 (co-founder of the National Wellness Institute). The six dimensions he identified were occupational, physical, social, intellectual, spiritual and emotional. In the last few years, Blue Zones® proposed the evidence-based Power 9®. These can be grouped into the four categories of natural movement, purpose, healthy eating, and connection/belonging. In 2010, Tom Rath and James Harter, researchers with Gallup® released the book entitled, *Wellbeing: The Five Essential Elements*, which framed well-being into five elements, career, social, physical, financial and community.

Today, most wellness frameworks have some version of these models, usually including the four elements of mind, body, spirit and emotion. In fact, recent work by Tony Schwartz blended individual well-being and organizational well-being around what he calls these “four core energy needs”. Further work in the field of organizational development through leaders like Patrick Lencioni define organizational health around culture, including leadership, teamwork, communication and clear expectations.

A realistic conclusion is there is no one perfect model for well-being. The answer truly lies in the uniqueness of the vision, mission, values and culture of the organization. Therefore, the model we will use for *ISU Wellbeing* is a hybrid of other models; one that captures the unique dynamics, needs, and opportunities of our university. ***Our model of well-being revolves around six main elements:***

- ***mental,***
- ***physical,***
- ***spiritual,***
- ***emotional,***
- ***financial, and***
- ***community.***

As we incorporate this framework for well-being we create the conditions for a culture of well-being. ***The ISU WellBeing framework is the launch pad to advance ISU’s culture as a great place to work and learn and where every person may bring his/her best self to work and life.***



***The ISU WellBeing framework is a launch pad to advance ISU’s culture as a great place to work and learn and where every person may bring his/her best self to work and life.***

The chart below defines these six *ISU WellBeing* elements and describes what it looks like across the organization.

| <b>Element of ISU Well-being</b>   | <b>What this looks like for the Individual...</b>   | <b>What this looks like across the Institutional...</b>   |
|--|---|---|
| <p><b>Mental Well-being</b> looks at our intellectual capacity, including creativity, innovation, personal interests, and uniqueness.</p>  | <p>Employees practicing mindfulness for focus and clarity. Employees having a sense of “choicefulness” and intentionality in decision making and use effective thinking skills for solutions that make sense for them. Employees participate in personal and professional development regularly. They are satisfied in work and life.</p> | <p>There is a sense of autonomy in the workplace evidenced by employee mastery of their skills and talents. Supervisors and managers support and encourage enthusiasm for continuous learning, development, and growth in areas of interest to employees.</p>   |
| <p><b>Physical Well-being</b> is about renewing and sustaining quality physical health over a lifetime.</p>  | <p>Employees are active every day and moving on a regular basis, they eat nutritious foods and are well rested. Everyone gets their preventive exams (including dental) and schedule any age and gender related screenings. They are physically healthy.</p>  | <p>The campus environment has walking paths and bike paths that are well marked and maintained. Outdoor areas for activity and relaxation are everywhere. Employees take allotted breaks and get away from their desks for lunch. Workstations support healthy movement and cafeterias provide healthy options. There is a balance that preserves nature and creates a better space to live and work.</p> |
| <p><b>Spiritual Well-being</b> is defined by caring relationships, purpose in life, and values that guide our every day.</p>   | <p>Employees find purpose in their work, they live their values through their actions. There is a genuine caring, concern, and compassion among colleagues. People are fully engaged and interacting with energy and passion.</p>   | <p>Leaders across the organization set clear expectations and share a common vision. People are connected to the mission and have a clear work purpose that provides meaning and inspiration to bring their best every day.</p>   |
| <p><b>Emotional Well-being</b> recognizes the interaction of our feelings and the impact they have on how we see ourselves, our work, and the world around us.</p>                                     | <p>Employee’s experience their emotions with awareness and self-control. They are able to feel, manage and express emotions appropriately with others. They have caring and compassionate relationships. They are genuinely happy.</p>  | <p>Leaders value and appreciate the work of employees. Leaders communicate that employees make a difference and provide positive and constructive feedback on a regular basis. Leaders demonstrate compassion and caring for the people they work with.</p>   |
| <p><b>Financial Well-being</b> is a satisfaction with one’s overall standard of living. It is the need for financial security and represents the ability to effectively manage our economic lives.</p> | <p>In addition to the mandatory retirement plans, employees also participate in voluntary retirement plans. They are living within their means and saving for the future. They spend money on memories and experiences, not things. They are confident in preparing and executing a budget.</p>   | <p>Employees are provided resources and support to manage their finances across their lifespan. Financial tools make investing easy. Employees bring energy and focus to their work, undistracted by financial worries and confident in their financial future. They value ISU for supporting their financial goals.</p>  |
| <p><b>Community Well-being</b> is characterized by a sense of belonging, giving back both socially and to one’s environment.</p>   | <p>Employees are actively participating in their communities through volunteer time, charitable donations, or gifts of talent. They are interacting with neighbors and creating new friendships. They have a sense of safety and pride in their community.</p>  | <p>The employees are encouraged to volunteer and donate either time or finances to the community. Policies support time-off to be involved. The environment is supportive of healthy and active lifestyles. Everyone embraces making the institution a safe, welcoming and inclusive environment.</p>   |

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## AN INVENTORY OF WELL-BEING AT ISU

Throughout 2014, a complete review of wellness-related data was conducted. This broad data gathering process included annual health care claims data, conversations across campus, survey reports and data, and the review of work previously conducted by Sibson Consulting. Following are the highlights from this review and a summary of the conclusions leading to the foundational priority areas identified. (Greater detail from the analysis can be found in Appendix A.)

Key findings as they relate to the well-being initiative:

### Health Plan Claims

- Top health claims categories are bone/muscle/ligament, benign/cancerous tumors, and routine diagnostic services.
- Top chronic conditions by prevalence are hypertension, diabetes, depression and osteoarthritis. All had higher prevalence rate than US Benchmark.
- Members with claims greater than \$100,000 increased by 53% (15 to 23) from 2012 to 2014.
- The top five indications by pharmacy cost (accounting for 38% of total pharmacy plan costs) are diabetes, inflammatory conditions, cancer, high blood cholesterol, and attention disorders.
- The cost of care, on a Per Member Per Month (PMPM) basis, triples as members move from a single chronic condition to a double chronic condition and triples again when they move from a double chronic condition to a triple chronic condition.

### Campus Conversations

- There are opportunities to improve communication and awareness across campus.
- Employees are very enthusiastic about well-being and are looking forward to programs and services that will support them in choosing healthy lifestyles.
- Employees want programs and services that support all elements of well-being across their life-span.

### Surveys and reports

- People love working at ISU! (78.7% indicated agree or strongly agree with the statement, “ISU is an excellent place to work.” (2013 Benefits Survey)
- Great effort and work has already been done to advance well-being at ISU. (Sibson Consulting and University Benefits Committee)
- There are some established programs and services in place across campus, but they are siloed and unknown to the majority of employees.
- Opportunity exists to improve the overall well-being of employees and the university. It will be important to leverage some of the great sub-cultures and programs already established.

## RECOMMENDATIONS FROM THE INVENTORY

From this data gathering process, we have a better understanding of the association and impact of healthy lifestyles and overall sense of well-being on health care costs and culture at ISU. We realize that overall well-being encompasses more than just the physical health of our employees. From this review we present these opportunities for *ISU WellBeing*.

- Focus on maintaining health and reducing risk factors. Keep the healthy people, healthy.
- Provide resources and opportunities for chronic condition support. This may include partnering with local providers, vendors, and community resources to provide needed care and support tools.
- Create communication channels for well-being across campus and raise awareness to trusted resources and tools, including health care consumerism.
- Provide programs and services that support all elements of well-being (mental, emotional, physical, spiritual, financial, and community) across the life-span of employees. This may include education, advocacy, and technology support to champion a mindset and behavior for lifelong well-being.
- Leverage the love for working at ISU and build on current cultures that support and encourage well-being.

## ELIGIBILITY FOR ISU WELLBEING

The *ISU WellBeing* initiative for employees intends to broadly engage faculty and staff to build a culture and community of well-being. With the exception of our temporary and student employees, all Iowa State University employees, regardless of health insurance coverage, are eligible for the *ISU WellBeing* programs and services.

Note that some *ISU WellBeing* programs and/or services may be limited to those eligible for ISU medical benefit plans or may be limited by contract. Program eligibility will be specified. *ISU WellBeing* reserves the right to therefore modify eligibility for any given program or service.

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## ISU WELLBEING STRATEGIC PRIORITIES

The *ISU WellBeing* initiative advances the quality of work and life priorities and supports the mission of Iowa State University.

The mission of Iowa State University is to “*create, share and apply knowledge to make Iowa and the world a better place.*” The university strategic priorities that create a direct line-of-sight for *ISU WellBeing* are:

- *Iowa State will be a magnet for attracting outstanding faculty and staff who create, share, and apply knowledge to improve the quality of life.*
  - *Foster a university culture and work environment that rewards faculty and staff for their contributions, supports a balance between work and life, and inspires individuals to work together to achieve at the highest level of their abilities.*
  - *Collaborate with Ames and surrounding communities to provide a premier living environment.*
- *Focus resources toward efforts that ensure a welcoming, inclusive, and safe campus and community.*

The following vision, mission and strategic priorities create a sustainable and impactful culture of well-being at Iowa State University.

### ISU WellBeing – Vision, Mission and Priorities

#### Vision

*ISU WellBeing* is a strategic partner and trusted resource in improving and sustaining life-long well-being for the ISU Community.

#### Mission

*ISU WellBeing* creates the conditions in which well-being and healthy lifestyles can thrive in our every day.

To achieve this, *ISU WellBeing* will focus on five **strategic priority areas**:

- Improve the health status of our employees by providing resources, tools and services that support healthy lifestyle behaviors.
- Enable employees to adopt and maintain healthy lifestyle choices.
- Create a safe and supportive environment that makes healthy choices easy.
- Educate and empower our employees to effectively manage and utilize the health care system.
- Foster an inclusive and engaging culture of well-being that enables employees to bring their best self to work and life every day.

The diagram on the following page provides an overview of *ISU WellBeing* integration with Board of Regents and ISU priorities, the UHR vision and mission, current programs and services, and our opportunities for growth.

**ISU WellBeing**  
Strategic Plan 2015 – 2020

**IOWA STATE BOARD OF REGENTS – IOWA STATE UNIVERSITY MISSION AND PURPOSE**

**UHR Vision:** University Human Resources leads as a strategic partner and trusted resource in advancing Iowa State University as a world class institution.

**UHR Mission:** UHR is committed to advancing Iowa State University as a premier place to work and learn.

**MISSION: ISU WELLBEING**

*ISU WellBeing creates the conditions in which well-being and healthy lifestyles can thrive in our every day.*

**ISU WellBeing Strategic Priorities**

- Improve the health status of our employees.
- Enable employees to adopt and maintain healthy lifestyle choices.
- Create a safe and supportive environment that makes healthy choices easy.
- Educate and empower our employees to effectively manage and utilize the health care system.
- Foster an inclusive and engaging culture of well-being that enables employees to bring their best self to work and life every day

| MENTAL  | PHYSICAL   | SPIRITUAL  | EMOTIONAL  | FINANCIAL  | COMMUNITY   |
|---|--|--|--|--|---|
| <i>Network</i> Community Counseling Services<br>*Well-being Series<br>*Pilot with MGMC/McFarland<br>*Thinking for Sustainable Well-being sessions<br>*Well-being Coaching<br>*Well-being portal | Exercise Clinic<br>Horticulture Research Station – Farm to Campus Orders<br>Registered Dietitian Nutritionist<br>Annual flu shots<br>ISU - Healthiest State Walk<br>ISU Recreation Services<br>ISU Dining Services<br>*Pilot with MGMC/McFarland<br>*Well-being Coaching<br>*Well-being portal | Learning and Development (UHR)<br>*Well-being Series<br>*Well-being Coaching<br>*Well-being portal | Employee Assistance Program (UHR)<br>*HAES®/Normal Eating initiative<br>*Stress and Finances workshop<br>*Partnership with Network Counseling Clinic<br>*Well-being Coaching<br>*Well-being portal | Retirement Education<br>TIAA-CREF Educational Services<br>Wellmark – Blues 365 discounts<br>State of Iowa discounts<br>*Annual review health plans<br>*Partnership with Financial Counseling Clinic<br>*Medical Self Care training<br>*Well-being Coaching<br>*Well-being portal | ISU Childcare & Family Resources (UHR)<br>Live Green!<br>ISU Extension and Outreach<br>Bike Share program<br>*ISU WellBeing webpage<br>*Walking clubs/paths<br>*Biofeedback rooms<br>*Well-being Coaching<br>*Well-being portal |

*\*Denotes new programming to be developed/incorporated through strategic plan.*

**ISU WellBeing Opportunities: 2015-2020**

The opportunity exists to build and sustain a culture of well-being. The framework for Iowa State University includes the following:

- Building a solid foundation – communications, branding, infrastructure, environment
- Integrating health and well-being services – alignment with benefits (through integrated reporting, financial planning, health care consumerism, and EAP).
- Leveraging partnerships and collaboration across campus (existing services), the Ames community, and the state of Iowa.
- Measuring impact – health care claims/costs, overall participation, employee satisfaction/interest survey, and well-being/culture survey.

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## **CULTIVATING ISU WELLBEING**

The *ISU WellBeing* plan builds the conditions for a culture of well-being and supports advancing Iowa State as a great place to work and learn.

Over the next 3-5 years, *ISU WellBeing* will have a phased implementation that allows for both planned growth and adaptation as opportunities surface. This balances the promotion and coordination of existing programs and services at ISU, as well as, developing and implementing new programs and services to meet the priority needs of employees.

The four phases provide the structure required for **communicating, collaborating, developing, and sustaining** the wellness effort at Iowa State University. The phases are described below and the process allows optimal time for the evolution of the paradigm shift and the embedding of well-being in the university culture. The four (4) phases serve to organize activities but in reality are overlapping to reflect the iterative cycle of build, implement, and evaluate.

### ***Phase 1 – Engage the ISU Community (2014 – June 2016)***

The first phase, already underway, is focused on raising awareness of well-being and partnering with current programs and services across campus. The goal is to create a common understanding and language around the elements of well-being for ISU. Current outreach across campus has included several presentations and discussions with colleges, departments and groups resulting in face-to-face opportunities with over 880 employees.

### ***Phase 2 – Enhance our Programs and Services (July 2015 – December 2016)***

Phase 2 focuses on leveraging the existing programs and services at Iowa State University in order to connect and further the well-being efforts. This includes integrating with other University Human Resources services and priorities, utilizing our benefit vendor's wellness services, and partnering with university and community resources.

### ***Phase 3 – Expand the Opportunities (July 2016 – December 2018)***

In Phase 3 we begin the development and implementation of new priorities and programs that are identified as current priority needs and best practices. These services fill the gaps in the current offerings and round out a multi-faceted approach to creating the conditions that support a culture of well-being.

### ***Phase 4 – Evolve the Culture (2019 - 2020)***

The final phase in this approach is the institutional “check-up” for trends, progress and impact. Earlier phases will incorporate metrics however, Phase 4 includes a comprehensive evaluation of the well-being culture at ISU. This includes both individual well-being and organizational well-being.

The four phases are described in more detail on the following pages.

## PHASE 1 - ENGAGE THE ISU COMMUNITY (2014 – JUNE 2016)

In Phase 1, the *engagement* component focuses on raising awareness of and partnering with current programs and services across campus. This includes establishing communication channels and processes, raising awareness of existing services, and building rapport with employees and entities throughout the campus community. These steps include the following:

### Step 1: Generate increased awareness across campus. **COMPLETED**

- Holding "*Wellness to Well-being*" conversations that set the stage for the shift in perspective from "jogging and broccoli" to a more holistic perspective of individual and organizational well-being.
- Providing ongoing focus group opportunities for employee feedback.
- Vetting the *ISU WellBeing* plan across campus to obtain feedback from and perspective of ISU employees.
- Offering potential pilot programs/partnerships with departments requesting assistance or identifying need.

### Step 2: Establish communication channels and processes. **IN PROGRESS**

- Creating the brand and marketing of *ISU WellBeing*, in partnership with the Office of University Marketing.
- Developing the *ISU WellBeing* webpage. This involves the finalizing a prototype previously developed. This webpage serves as a gateway for *ISU WellBeing* and links to other ISU wellness-related programs and services, vendor services, and community outreach.
- Collaborating with UHR units to optimize communication opportunities, i.e. benefits open change, TIAA-CREF retirement and financial wellness webinars, and new employee onboarding.
- Partnering with other departments to provide *ISU WellBeing* information, i.e. new faculty development, P&S Development Conference, Live Green, and Environmental, Health and Safety.
- Integrating with UHR's university-wide learning management system (Learn@ISU) and opportunity within the proposed HR/Payroll system.

### Step 3: Create university-wide support systems (*ISU WellBeing* Partner Forums).

There has been an overwhelming interest and response to the well-being efforts at Iowa State University since the idea's inception in 1997. This enthusiasm has typically been expressed from individuals, groups and

## PHASE 1 AND 2: ENGAGEMENT AND PROGRAMMATIC METRICS

Measure awareness, reach and impact with employees

- Inventory of wellness-related programs
- 880 participants in "*Wellness to Well-being*" conversations
- Pilot programs with 4-6 colleges or units
- Measure *ISU WellBeing* website visits
- Establish an integrated calendar for Benefits and *ISU WellBeing* events
- Communicate all *ISU WellBeing* workshops in the learning management system (Learn@ISU) and track participation
- Track employee satisfaction with programs

departments with expertise or specialization in one or more elements of well-being. This grassroots approach has been effective in keeping well-being a priority at the University and in continuing to build on the momentum of the work initiated by the University Benefits Committee.

Given the decentralized nature of the University and the time demands on employees, it is difficult to bring these partners/stakeholders together on a regular basis and to expect more from their already limited “free” time. Therefore, we will establish regular partner forums throughout the year to bring together these passionate individuals. These forums will create the opportunity to tap into the energy and enthusiasm of interested individuals and entities for thoughtful dialogue and aligned direction for the university while at the same time respecting the time demands of their given positions.

These *ISU WellBeing* partner forums will provide a venue for cultivating ongoing communication and collaboration in affirming the strategic direction for well-being at Iowa State University. The following is a list of some of the stakeholders already identified across campus. This is not an exhaustive list and it may evolve over time as new partners and stakeholders express a shared interest in the priorities.

Potential *ISU WellBeing* Forum Participants:

- HR Liaisons
- ISU Dining Services
- ISU Recreation Services
- Environmental, Health and Safety
- Ames Laboratory Occupational Medicine Office
- Live Green (Facilities Planning and Management)
- Exercise Clinic (College of Human Sciences)
- Nutrition Clinic for Employee Wellness
- Financial Counseling Clinic (Department of Human Development and Family Studies)
- *Network* Community Counseling Services (Psychology Department)
- ISU Extension and Outreach

The *ISU WellBeing* Forum Participants also include a number of University Human Resources offices:

- Benefits, Employee Assistance Program and Retirement Education
- ISU Child Care and Family Resource Services
- Learning and Development

#### **Step 4: Establish ISU presence on the local, regional and national well-being stage *IN PROGRESS***

##### **Healthiest Ames**

Healthiest Ames is a grassroots, community initiative with a vision to make Ames the healthiest community in the state. This effort is an extension of a statewide effort sponsored by Wellmark BCBS and the Blue Zones® project. The Wellness Coordinator serves on the Healthiest Ames Advisory Board along with representatives from local businesses, schools, the city of Ames, and the local health care system. These entities collaborate to enhance the health and well-being of the community in four main focus areas, Physical Activity, Healthy Food Choices, Chronic Disease Management, and Community Connectedness. The Wellness Coordinator currently serves on the Executive Committee and is overseeing the development of an Ames Worksite Wellness Collaboration.

### **Healthiest State Initiative**

Iowa State University and the *ISU WellBeing* office will serve as host to the annual Healthiest State Initiative conference. The conference gathers participants across the state of Iowa and focuses on knowledge sharing, networking, and professional development among wellness and well-being professionals in corporations, non-profits, higher education, and government.

The ISU location permits a larger than typical conference attendance (~400), showcases Iowa State University and the well-being expertise within our faculty and researchers. The conference is planned for May 19 (2016) at the Scheman Building, ISU is the presenting sponsor, and the Wellness Coordinator serves on the conference planning committee.

### **Building Healthy Academic Communities**

Iowa State University is a founding member of the National Consortium for Building Healthy Academic Communities (BHAC) in April 2014. The focus of BHAC is *to comprehensively advance higher education best practices and standards in health and well-being for faculty, staff and students and their surrounding communities*. The membership is composed of academic leaders, faculty and professionals focused on health promotion and wellness at institutions of higher learning, both large and small. (BHAC, Strategic Plan 2015-2020)

The vision of BHAC is to be *a transformational leader in creating and sustaining optimal well-being in academic communities*. The Wellness Coordinator represents Iowa State University on this national level and currently serves on the Advisory Board.

## PHASE 2 - ENHANCE OUR PROGRAMS AND SERVICES (JULY 2015 – DECEMBER 2016)

Phase 2 builds on the increased awareness across campus and focuses more on leveraging the existing programs and services at Iowa State University in order to further the well-being efforts. This includes integrating with other University Human Resources services and priorities, uncovering and reviewing current benefit vendor services that may already be available for ISU, partnering with community resources and health providers, and researching additional best practices in wellness. Another key component of this phase is building the infrastructure needed to implement and sustain this higher level of programming now and in the future.

This includes the following initiatives:

- Support current programming including flu shot vaccination, Healthiest State Walk, new faculty development, and P&S Council Professional Development Conference. **IN PROGRESS**
- Integrate with other UHR learning such as leadership development, change management, and financial well-being education. **IN PROGRESS**
- Leverage existing programs and resources – through communication, participation, and partnering. **IN PROGRESS**
- Collaborate with local health providers (McFarland Clinic and MGMC) to provide chronic condition support such as diabetes interventions, blood pressure screenings, and stroke detection. **IN PROGRESS**
- Build the infrastructure to sustain programming design – includes registration, tracking, wellness web portal, and integration with a new HR/Payroll system. **IN PROGRESS**
  - Develop workshop registration process utilizing university learning management system (Learn@ISU)
  - Review current vendors and research additional vendors for wellness portal option that includes high quality wellness information, health inventory, and programs with tracking options for participation and outcomes (include future integration with HR/Payroll system)
  - Acquire an online presentation tool – GoToMeeting, Zoom, Adobe Connect, etc.

### EXISTING WELL-BEING RELATED PROGRAMS

- *Network* Community Counseling Services
- Financial Counseling Clinic
- Exercise Clinic
- ISU Nutrition Clinic
- Horticulture Farm – Food Drops
- Environmental Health and Safety
- Live Green/Sustainability – Facilities, Planning and Mgmt.
- Employee Assistance Program (UHR)
- ISU Child Care and Family Resource Services (UHR)
- Learning and Development (UHR)
- Blues 365 Discounts and other vendor resources
- TIAA-CREF Educational Services
- State of Iowa discounts

### PHASE 3 – EXPAND THE OPPORTUNITIES (JULY 2016 – DECEMBER 2018)

Phase 3 begins the development and implementation of new priorities that fill gaps in the current offerings. This includes best practices in the wellness field based on impact and outcomes, as well as opportunities identified during the Wellness Coordinator’s introduction and discovery tour during 2014. While the existing programs and services on campus and the respective well-being components indicate respectable coverage in most areas (career, social, financial, physical, and community), there are opportunities to fill gaps in all areas of well-being and in the employee groups that are eligible for those services.

The expansion phase allows for a more strategic implementation over time. Furthermore, it allows a more structured progression in addressing needs, interests and gaps in individual wellbeing. Action steps in this phase include the following:

#### Individual Well-being

- Implement Medical Self Care training.
- Offer a financial well-being workshop on “stress and finances”; partner with UHR Financial Education staff.
- Fulfill additional needs on stress and work-life balance issues as requested by departments and groups across campus.
- Add programs to support normal/intuitive eating, daily movement, mindfulness, energy management, connection, and life purpose.
- Investigate potential for an incentive based system.

#### Organizational Well-being

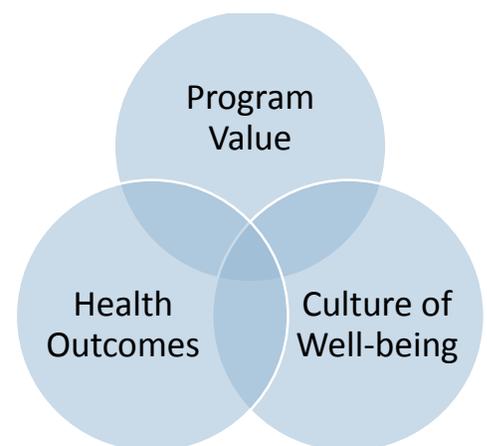
- Pilot “*Well-being Theory into Practice*” seminars that highlight relevant and leading-edge well-being research conducted by ISU researchers and faculty that has application in our lives today.
- Support a leadership development series with sessions on work-life and resiliency.
- Introduce “*Thinking for Sustained Well-being*” training focused on creating healthier and more fulfilling lives through greater awareness of cognitive patterns.
- Support the built environment through exploring the establishment of: biofeedback/relaxation rooms, blood pressure stations, water fountain usage, walking paths, bike routes, and creating bike rental and walking club opportunities.

### PHASE 4 – EVOLVE THE CULTURE (2019 - 2020)

Phase 4 assesses the trends, progress and impact for moving *ISU WellBeing* forward. It includes a “look back” and comprehensive evaluation of the well-being culture at ISU. This assessment is critical to ensure sustainability of the conditions that support a culture of well-being and its impact on the university in furthering our mission to create, share and apply knowledge to make Iowa and the world a better place.

Three areas of evaluation address program value, health outcomes, and culture of well-being support. In developing an evaluation process for *ISU WellBeing*, it is important to keep in mind the old adage, “*not everything that can be counted counts, and not everything that counts can be counted*”.

#### Well-being Evaluation Framework



The intent of the evaluation process is to illustrate program impact as well as inform future direction and strategy. We anticipate given the changing landscape of well-being that additional metrics may emerge as new technology and tracking systems are established. Currently, there is limited baseline data due to the infancy of the program.

There are three (3) measurement area to be used to evaluate the *ISU WellBeing* plan as a whole.

#### **Program Value**

- **Participation** – The data would be tracked for every program and service offered through *ISU WellBeing*. Challenges may exist initially until the technology is available to provide accurate reports. The information would include overall participation, specific program participation, and total number of programs attended by participant.
- **Individual Program Evaluations** – These measures would be obtained through a post-program evaluation. The information would include satisfaction with program, presenter, and content; as well as information regarding impact on current work situation and suggestions for future programming.
- **Employee Satisfaction/Interest survey** – This tool would be provided in-house via a survey tool and would include all self-report information. Some of the information collected would include employee satisfaction, changes in attitudes, knowledge and skill, personal impact/value, and other well-being areas of interest or need.

#### **Health Outcomes**

**Health Care Claims and Costs** – The data would be provided by our current health plan vendors as part of the annual review process and/or as needed by request. This would include medical (specifically chronic conditions and CRG's), pharmaceutical, and dental information; allowing for an on-going assessment of employee and member needs. This data would be limited to only those on our health plan.

#### **Culture of Well-being**

**Well-being/Culture Survey** – This tool could be provided either by an internal or external process and may be part of a greater university initiative (e.g., work-life survey). The intent of the survey for well-being would be to gather and assess employee engagement, attitudes, thoughts, perceptions, and feedback on the culture of the university and how the university supports well-being for all employees.

As the program matures, additional measures may include biometrics, worker's compensation claims, disability claims, sick leave, turnover, performance measures, etc.

From these measurement resources, a simplified set of dashboard metrics could be determined to provide a quick look at the program on an annual basis. A few suggested metrics include employee satisfaction, employee participation, Critical Risk Group (CRG) shifts, chronic conditions prevalence, and ratings on ISU as an "excellent place to work."

In addition, measures for each element of well-being can be determined. These measures can vary to some degree as the programming evolves over the next five years.

## ISU WELLBEING – TIMELINE OF ACTIVITES

### 2014 – 2017 CALENDAR

The following calendar for the ISU WellBeing plan details actions over the next 3 years. The calendar would be updated and revised as plans adapt and address realities over time.

| <b>Phase I: Engage the ISU Community</b> |  |                        |                      |
|--|--|------------------------|----------------------|
| <b>Year</b>                              | <b>Task Outcomes</b>   | <b>Completion Date</b> | <b>Partners</b>      |
| 2014                                     | “Wellness to Well-being” conversations   | As requested           |                      |
| 2014/2015                                | Focus group opportunities across campus  | As requested           |                      |
| 2015/Q1                                  | Integrate with internal UHR programs and services: EAP   | January 2015           | UHR-Benefits         |
|  | Integrate with internal UHR programs and services: Leadership Development  | January 2015           | UHR - ER/LR          |
| 2015/Q2                                  | Integrate with internal UHR programs and services: Financial Education/Retirement Consulting   | June 2015              | UHR-Benefits         |
| 2015/Q2                                  | Review health care claims data via Benefit Vendor Review   | June 2015 (annually)   | UHR-Benefits         |
| 2015/Q3                                  | Collaborate with UHR units on communication opportunities, i.e. Benefits   | August 2015            | UHR-Benefits         |
| 2015/Q3                                  | Assess vendor reviews - wellness services  | October 2015           | UHR-Benefits         |
| 2015/Q3                                  | Sharing <i>ISU WellBeing</i> operating plan with campus  | December 2015          |                      |
| 2016/Q1                                  | <b>Build the <i>ISU WellBeing</i> website</b> <ul style="list-style-type: none"> <li>• Link to Learning Management System (Learn@ISU)</li> <li>• Promote internal well-being services, Exercise Clinic, Horticulture Farm, <i>Network</i> Counseling, Environmental Health and Safety, ISU Extension and Outreach, etc.</li> <li>• Promote discounts – Blues 365, State of Iowa, etc.</li> </ul> | January 2016           | UHR- IT              |
| 2016/Q2                                  | Create brand and marketing plan for <i>ISU WellBeing</i>   | June 2016              | University Marketing |
| 2016/Q2                                  | Create <i>ISU WellBeing</i> information and print materials  | June 2016              |                      |

## 2015-2016 Phase 2: Enhance our Programs and Services

| Year    | Task Outcomes   | Completion Date        | Partners   |
|---------|---|------------------------|--|
| 2015/Q3 | Offer pilot programs with departments requesting assistance   | As requested           | Campus   |
| 2015/Q3 | Support current wellbeing programs and services: <b>flu vaccination program</b>   | October 2015           | Ames Lab and HR Liaisons                           |
| 2015/Q3 | Support current wellbeing programs and services: <b>Healthiest State Walk</b>   | October 2015           | Nutrition Clinic and FSHN                          |
| 2015/Q4 | Launch <b>Well-being Series</b> on stress management, energy management, and work-life                                      | December 2015          | UHR-Benefits and Alumni Association                |
| 2016/Q1 | Partner with and promote external vendor and community resources addressing chronic condition support (MGMC and McFarland)  | January 2016           | McFarland and Healthiest Ames                      |
| 2016/Q1 | Acquire an online presentation tool – GoToMeeting, Zoom, etc.   | February 2016          | UHR  |
| 2016/Q1 | Support current wellbeing programs and services: <b>P&amp;S Professional Development Conference</b>                         | As requested (Feb/Mar) | P&S Council  |
| 2016/Q1 | Research and assess well-being portal options for database/tracking tools, program implementation, evaluation opportunities | March 2016             | UHR- Benefits                                      |
| 2016/Q2 | Initiate regular <b>ISU WellBeing Partner Forums</b>  | April 2016             | Various ISU Stakeholders <i>(to be determined)</i> |
| 2016/Q2 | Provide <b>Stress and Finances workshop</b>   | April 2016             | UHR-Benefits                                       |
| 2016/Q2 | Hire <b>Registered Dietician Nutritionist (RDN)</b>   | April 2016             |  |
| 2016/Q2 | Monitor health care claims data during Benefit Vendor Reviews   | May/June 2016          | UHR-Benefits                                       |
| 2016/Q2 | Support current wellbeing programs and services: new faculty development  | As requested (Spring)  | Provost Office                                     |
| 2016/Q3 | Introduce a <b>“HAES®/Normal Eating” initiative</b>   | August 2016            | Nutrition Clinic                                   |

**2016-2018 Phase 3: Expand the Opportunities \***

| <b>Year</b> | <b>Task Outcomes</b>  | <b>Completion Date</b> | <b>Partners</b>                    |
|-------------|---|------------------------|------------------------------------|
| 2016/Q4     | Provide <b>RDN coaching support</b> for well-being  | October 2016           | TBD                                |
| 2016/Q4     | Launch <b>well-being portal</b>   | November 2016          | Benefits                           |
| 2016/Q4     | Create <b>walking clubs</b> and promote walking paths   | November 2016          | FP&M                               |
| 2016/Q4     | Research opportunity for biofeedback/relaxation rooms   | December 2016          | TBD                                |
| 2017/Q1     | Implement a <b>Medical Self Care training</b>   | January 2017           | UHR - Benefits                     |
| 2017/Q1     | Expand communication outreach and utilize social media  | January 2017           | UHR – Internal IT                  |
| 2017/Q1     | Initiate an <b>“Every Day Fitness” (9 – 5:00) program</b> <ul style="list-style-type: none"> <li>• Promote stairwell usage</li> </ul> | March 2017             |                                    |
| 2017/Q3     | Introduce a <b>“Thinking for Sustainable Well-being” training</b>   | September 2017         | UHR- Learning and Development      |
| 2017/Q4     | Pilot <b>“Well-being Theory into Practice” Well-being Seminar</b>   | October 2017           | TBD                                |
| 2016/17     | Integrate with new HR/Payroll system  | TBD                    |                                    |
| 2018        | Implementation of <b>Health Care Consumerism training</b>   | 2018                   | Benefits and Health Plan Providers |

\*Contingent upon successful completion of prior programs, services, and events.

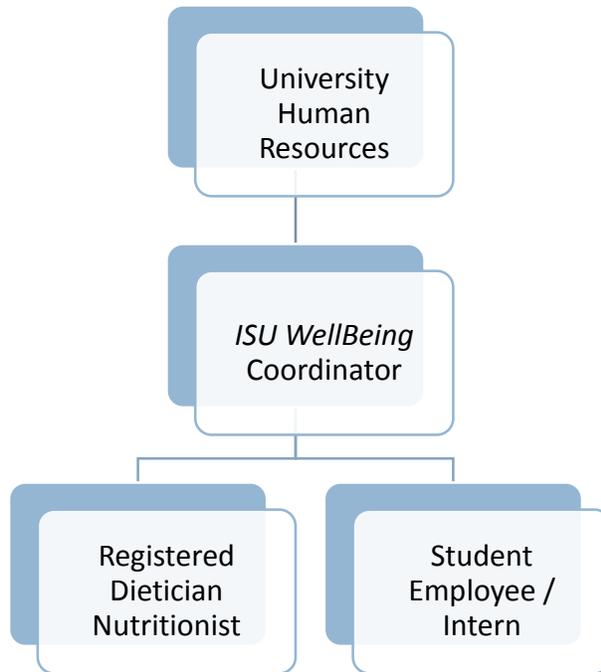
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## STAFFING (ISU WELLBEING TEAM)

The current program supports 1.0 FTE in the Wellness Coordinator and a 0.5 FTE Registered Dietitian. Additional staffing and program support is proposed to launch the program according to the strategic plan. This support will include 1) increasing the Registered Dietitian to a full-time position, and 2) adding program support through a student employee. Additional assistance could be obtained through providing a student internship. Further assistance is provided through partnerships and collaboration with internal UHR staff. This includes support from our HR Service Center, our Retirement Information Educator, our Employee Assistance Program provider, and our Learning and Development consultant.

To enhance the program through phases three and four, additional staffing and expertise may be needed for programs, presentations, communications, and coaching.

### ISU WellBeing Organization



## COMMUNICATION PLAN

Communication is a key component to the success in creating the conditions for a culture of well-being at ISU. The following plan has been drafted to help integrate the promotion and marketing of the benefits and well-being services for all eligible members. The intent of the plan is to guide the communication efforts, maximize ISU communication mechanisms, and reduce duplication of services.

| Communication Tool                        | Frequency | 2015 - 2016 |       |                |                               |                |                                |                                   |          |           |           |                                   |           | 2016   |          |                |
|---|-----------|-------------|-------|----------------|-------------------------------|----------------|--------------------------------|-----------------------------------|----------|-----------|-----------|-----------------------------------|-----------|--------|----------|----------------|
|   |           | July        | Aug   | Sept           | Oct                           | Nov            | Dec                            | Jan                               | Feb      | Mar       | Apr       | May                               | June      | July   | August   | Sept           |
| <b>Inside Iowa State</b>                  | monthly   |             |       |                | x                             | x              |                                | x                                 | x        |           | x         | x                                 |           | x      | x        |                |
| WellBeing                                 |           |             |       |                | Flu shots/<br>H.State<br>Walk | Flu shots      |                                | Classes                           |          |           |           | Healthiest<br>State<br>Conference |           |        |          |                |
| Benefits                                  |           |             |       |                | Open<br>Change                | Open<br>Change |                                | Benefit Plan<br>Changes<br>2.1.16 |          |           |           | Flex                              |           |        |          |                |
| <b>Email (all employees)*</b>             | 1/4ly     |             |       | X              |                               |                | x                              |                                   |          | x         |           |                                   | x         |        |          | X              |
| WellBeing                                 |           |             |       | Flu shots      |                               |                | New classes                    |                                   |          | Classes   |           |                                   | TBD       |        |          | Flu shots      |
| Benefits                                  |           |             |       | Open<br>Change |                               |                | Benefit Plan<br>Changes 2.1.16 |                                   |          | Flex      |           |                                   | TBD       |        |          | Open<br>Change |
| <b>Website (wellbeing@)**</b>             | Ongoing   | Build       | Build | Build          | Build                         | Build          | Test                           | Go Live                           | x        | x         | x         | x                                 | x         | x      | x        | x              |
| Monthly article                           |           |             |       |                |                               |                |                                | Mental                            | Physical | Spiritual | Financial | Emotional                         | Community | Mental | Physical | Spiritual      |
| Online Newsletter                         |           |             |       |                |                               |                |                                | ISU WellBeing                     |          |           |           |                                   |           |        |          |                |
| Blog                                      |           |             |       |                |                               |                |                                | ISU WellBeing                     |          |           |           |                                   |           |        |          |                |
| Video                                     |           |             |       |                |                               |                |                                | TBD                               |          |           |           |                                   |           |        |          |                |
| Testimonials                              |           |             |       |                |                               |                |                                | TBD                               |          |           |           |                                   |           |        |          |                |
| Social Media                              |           |             |       |                |                               |                |                                | TBD                               |          |           |           |                                   |           |        |          |                |
| <b>Annual Reports/Presentations (TBD)</b> |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| P&S Council                               |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| Faculty Senate                            |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| AFSCME                                    |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| Seminar Series                            |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| <b>ISU WellBeing Brochure</b>             | As needed |             | Brand | Brand          | Brand                         | Brand          | Develop                        | Develop                           | Develop  | Develop   | Print     | Distribute                        |           |        |          |                |
| <b>Other Vendor Publications (TBD)</b>    |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| GRIN (Delta Dental)                       |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| BLUE Magazine (Wellmark)                  |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| EAP (Employee and Family Resources)       |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |
| TIAA-CREF                                 |           |             |       |                |                               |                |                                |                                   |          |           |           |                                   |           |        |          |                |

\* Email will be a joint communication update between *ISU WellBeing* and ISU Benefits regarding upcoming programs and important updates.

Email will be sent to all employees, as well as retirees on the health plan. In addition, post docs and other affiliates will be included as eligibility for services applies.

\*\* Topics for the website will include all dimensions of well-being, national health observances, *ISU WellBeing* programming and benefits highlights.

## INVESTING IN ISU WELLBEING

The chart below reflects a high level view of the expenditures including staffing and administrative costs, programming materials and supplies, and external services needed to support the strategic plan.

| Account # | Account Description                                  | Request        | Projected      | Projected      |
|-----------|--|----------------|----------------|----------------|
|           |  | FY 2016        | FY 2017        | FY 2018        |
| 202-19-35 | Administrative expenses and salaries (plus benefits) | 143,085        | 138,793        | 141,545        |
| 202-19-35 | Registered Dietitian Nutritionist (plus benefits)*   | 44,600         | 75,900         | 77,418         |
| 202-19-35 | Programmatic Expenditures**                          | 127,000        | 295,000        | 320,000        |
|           | <b>Total</b>   | <b>314,685</b> | <b>509,693</b> | <b>538,963</b> |

*\*Increase RDN to full-time in FY 2017*

*\*\*Program Materials & Supplies are estimated at this time.*

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## APPENDIX A – DATA GATHERING: ANNUAL HEALTH CLAIMS REPORTS

The annual health claims data comes from three main sources of information; the medical claims (*Wellmark 2013-2014 Annual Review*), the pharmacy claims (*Express Scripts 2014 Collaborative Planning Guide* and *Towers Watson Rx Collaborative Annual Review*), and the population health opportunities information (*2015 Employee Benefit Plan Review*).

### Medical Claims for 2013-2014 (*Wellmark 2013-2014 Annual Review*)

ISU's total cost of medical claims paid for 2013-2014 including fixed costs was over \$34.5 million for the period ending January 2014. The medical claims paid were consistently 91-92% of total costs. These costs are reflective of a total membership base of 13,011 (10,484 active, 2,523 retiree).

The current trend is driven by large claimants, spouse claims, and outpatient/office visits. Employees represented 46% of the membership and 51% of the claims. Spouse costs were 5 percent higher than those for employees. Drivers of spend for spouse claims included bone/muscles and ligaments, cancers/tumors, and nerves/eyes/ears which accounted for 38% of spouse claims.

### **Utilization and Health (all actives)**

- Bone/Muscle and Ligaments – This is a top diagnostic category, accounting for 13% of spend in 2013-2014. The main diagnosis codes are for back disorders, joint disorders and osteoarthritis.
  - Important note here is that 45% of the total costs are for physical therapy, typically this is only 8-10% of the cost.
- Benign/Cancerous Tumors – Claims paid for tumor conditions were driven by radiation therapy (Mayo Clinic) and costly injections. Employees represented 65% of claims paid.
- Routine Diagnostic Services – This category includes immunizations, well child visits, and general medical exams.
  - Compared to MarketScan® commercial benchmarks, ISU had higher utilization in cholesterol and mammogram screenings.
  - This category accounted for 8% of health claims paid and was utilized by 8,041 members. This is a reflection of preventive services and a favorable experience for ISU.

### **Top Chronic Conditions by prevalence (all actives)**

Chronic conditions contribute to health care costs and result in less productive employees. Identifying top conditions is a key factor in assessing the physical well-being of a population. The following are the top seven chronic conditions in our plan members.

| <u>Chronic Condition</u>   | <u>Prevalence Rate (ISU members)</u> | <u>Prevalence Rate (MarketScan®)</u> |
|----------------------------|--------------------------------------|--------------------------------------|
| 1. Hypertension            | 127/1,000                            | 98/1,000                             |
| 2. Diabetes                | 75/1,000                             | 54/1,000                             |
| 3. Depression              | 67/1,000                             | 38/1,000                             |
| 4. Osteoarthritis          | 58/1,000                             | 46/1,000                             |
| 5. Coronary Artery Disease | 32/1,000                             | 16/1,000                             |
| 6. Anxiety Disorder        | 32/1,000                             | 20/1,000                             |
| 7. Asthma                  | 30/1,000                             | 26/1,000                             |

All chronic conditions had a higher prevalence rate than the MarketScan® US Total Benchmark. This may suggest our membership is not as healthy as the populations or it may also be reflective of the high utilization of preventive services, more diagnosing conditions earlier than other populations.

In addition, there were four chronic conditions with prevalence rates higher than the previous year: rheumatoid arthritis, bipolar disorder, anxiety disorder and congestive heart failure (CHF). While physical health is a critical factor, we cannot exclude the importance of mental and emotional health as we review these rates.

### **Large claims (> \$100,000)**

- The top three diagnostic categories in our large claims expense include Cancer (radiology/chemotherapy), Obstetrical, and Injuries and Poisonings.
- The number of members with claims paid over \$100K increased from 15 to 23, accounting for an increase in costs of \$561,000.

### Pharmacy Claims for 2013-2014

*(Express Scripts 2014 Collaborative Planning Guide and Towers Watson Rx Collaborative Annual Review)*

Total cost of the pharmacy plan increased 2.2% when compared to the prior year. The top five indications by pharmacy cost (accounting for 38% of total pharmacy plan costs) are:

- Diabetes - 21% increase in PMPM (per member per month) costs from 2012 to 2013
- Inflammatory Conditions - autoimmune diseases such as rheumatoid arthritis, psoriasis increased 39% in PMPM from 2012 to 2013.
- Cancer – four of the top 10 drugs are used to treat cancer
- High blood cholesterol – one drug moved from 10<sup>th</sup> to 7<sup>th</sup> due to inflation and increased number of members on this prescription
- Attention disorders – mental health prescriptions continue to gain attention

The top five specialty indications are inflammatory conditions, cancer, multiple sclerosis, infections, and anticoagulants. The cost of the top five specialty indications represents 19.6% of the total plan cost.

### Population Health Opportunities (2015 Review) Health Care Claims Data

*(2015 Employee Benefit Plan Review)*

Medical and pharmacy claims paid for actives and retirees in 2014 (including fixed costs) increased 21% over 2013 costs for a total claims expense of \$51 million.

- Members with claims greater than \$100,000 increased by 50% (18 to 27) from 2012 to 2014, accounting for a \$2.4 million dollar increase of the two year time frame.
- Employees and retirees represent 46% of membership and 51% of claims cost.

Health care services are predominantly delivered locally with 71% of the membership attributed to McFarland Clinic in Ames, Iowa. And, the largest hospital spend (40%) was with Mary Greeley Medical Center, Ames, Iowa.

Note: 6.3% of membership is unattributed. These members are less likely to receive preventive care and are more likely to incur higher than average costs.

### Top Chronic Conditions by cost\* (for actives)

1. Diabetes (11%)
2. Hypertension (9%)
3. Disc Disease and Chronic Back Diagnosis (5%)
4. Breast Malignancy (5%)
5. Asthma (5%)

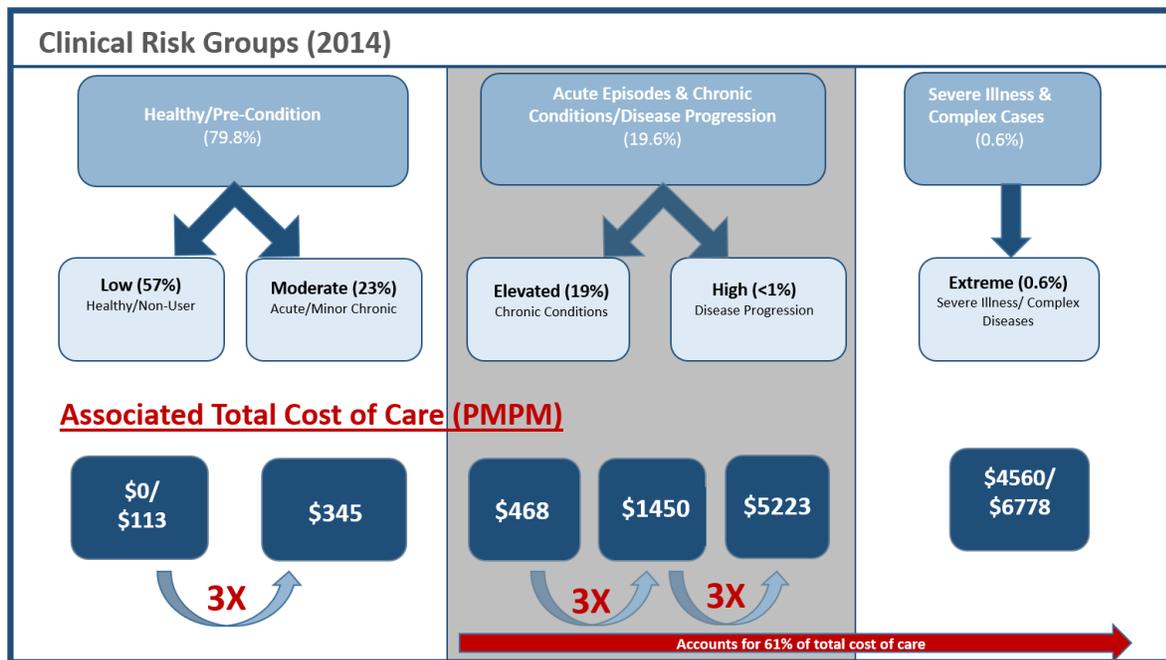
\*Pharmacy spend is not included in the percent of total cost of care.

### Clinical Risk Groups

David Hunnicutt, Past-President of Welcoa, said *“People value their health most when they lose it.”* He goes on to say, *“if you don’t believe that, just ask someone who has recently received a diagnosis of cancer, heart disease, or diabetes, just how important their health is to them.”*

The unfortunate piece of this is, when we lose our good physical health, it takes much more effort and time to get it back; assuming we can. It is truly much easier to stay healthy than to have to work at getting healthy again.

The following diagram (2104 Population Health Information) identifies the distribution of the clinical risk groups of our active members by percent of membership and impact on cost of care on a per member per month (PMPM) basis. The elevated to high risk groups provide the greatest opportunity for financial and health impact accounting for 61.4% of the total cost of care.



In the previous chart, the reality of “the cost of poor health” is demonstrated by increasing health care costs with increased health risk. When a person goes from a single chronic, such as a high blood pressure diagnosis, to a double chronic, like high blood pressure and diabetes, the associated cost of care triples (\$468 PMPM to \$1450

PMPM). And, if they progress from a double chronic to a triple chronic, such as high blood pressure, diabetes, and high cholesterol, the cost triples again (\$1450 PMPM to \$5223 PMPM).

Therefore, the greatest opportunity in containing health care costs and bending the rising trend in health care expenses is imbedded in the ***foundational principle of keeping the healthy people, healthy!*** This requires best practice interventions such as partnering with local providers on chronic conditions support, developing employee advocacy for health care consumerism, and providing resources and tools that encourage and support healthy lifestyle choices. Ultimately, this aligns with and supports the focus of *ISU WellBeing* in creating the conditions in which well-being and healthy lifestyles can thrive.

## CAMPUS CONVERSATIONS

Throughout 2014 several discussions with internal ISU stakeholders took place. In total, approximately 23 departments and over 880 employees have provided insight and feedback on well-being at ISU. A complete report of these findings was provided to the University Benefits Committee in late fall of 2014. The themes of this feedback are highlighted below.

### Top Themes

- Communication is a challenge. Employees are not aware of existing services and if they do know of them, they have a hard time finding wellness information and services.
- We have a decentralized campus and many cannot attend sessions on campus due to location, travel, or scheduling. Therefore, employees want options for access to programs and services.
- Employees are very enthusiastic about well-being and are looking forward to programs and services that will support them in choosing healthy lifestyles. This includes increasing awareness to their thinking and how it impacts/motivates their health choices.
- Employees want programs and services that support all elements of well-being (mental, emotional, physical, spiritual, financial, and community) and there is a need to address the full life-span from hire to retirement.

## SURVEY REPORTS

### 2013 Benefits Survey

The 2013 Benefits Survey was distributed to all benefit eligible employees except for those in the “non-supervisory/merit” classification since their benefit plan is provided by the State. A total of 1,884 employees responded, 57.3% of which were female. The majority of the respondents were from the Professional and Scientific staff classification (69%).

#### **Key findings related to the well-being of ISU**

- The majority of the respondents (75 – 85%) have limited knowledge about the current wellness services offered across campus.
- Core benefits such as contribution to medical plan, preventive care options in medical plan, and prescription coverage, were of top importance to respondents with 85% of respondents indicating “very important”.
- 94.6% respondents rated their perception of health as excellent or good.
- Financial well-being in terms of retirement planning is very important to employees.
- Stress, work load, work expectations, and work-life balance were common themes in open-ended comments.

- Lifestyle changes (healthy eating, physical activity, maintaining healthy weight, and stress management) were all areas indicated as needing change in habits.
- 78.7% either strongly agreed or agree with the statement, “ISU is an excellent place to work”.

## Other Surveys

The 2011 University Life Survey was also reviewed. This was distributed to over 30,559 faculty, staff and students in 2011. Approximately 7,000 responded to the survey, however the majority (60%) were from the student population. This survey was designed to provide the opportunity for feedback on the overall university goal to “ensure that the university is a great place to learn and work”. Following are a few points of interest that provided insight into the well-being of ISU.

### **Key Findings (2011 University Life Survey)**

- Overall, 70.5% of respondents agreed that ISU fosters an environment in which they can manage both a productive and professional life and a satisfying life. Percent was less for faculty (51.9%) and staff (65.6%).
- Overall, 78.3% of respondents agreed that ISU offers opportunities for personal development. Percent was less for faculty (64.5%) and staff (65.3%).
- Overall, 74.0% of respondents agreed that ISU offers opportunities for the enjoyment of life. Percent was less for faculty (53.3%).
- Most of the respondents, 92.6%, agreed that ISU maintains an attractive campus.
- The majority of respondents, 72.4%, agreed that ISU works to improve the quality of its facilities. Percent was less for faculty (64.0%)

Other surveys such as Campus Climate Survey 2004, COACHE: Faculty Job Satisfaction Survey 2013, ISU’s Diversity Audit and Asset Inventory 2013-2014, and Status of Women at ISU 2014 were taken into consideration.

## **SIBSON CONSULTING REVIEW**

In 2012, Sibson consulting was contracted to develop an employee well-being initiative for the university. In May, 2013 an operating plan was drafted. This plan included five recommendations for the initiative:

- Integrate physical wellness and the medical plan.
- Integrate workplace collegiality into self-assessment, supervisory training, performance appraisal and team-building activities/ training.
- Coordinate resources to improve consumer financial literacy and retirement planning.
- Stage activities to engage faculty and staff in wellness regularly throughout the year.
- Prioritize activities and incentives recognizing operational constraints.

In addition, they identified the following five strategic elements for promoting personal growth and achieving the desired results:

- Build wellness strategic plan around four priorities of health, prosperity, collegiality, and enrichment.
- Include a pledge for life-long well-being.
- Provide assessments for employees including lifestyle, biometrics, financial risk, workplace civility, career development and personal enrichment.
- Develop personal and professional plans for health enrichment.
- Take action through participation.

They also began a visioning process with stakeholders across campus. This resulted in an initial draft of the strategic imperatives that included a vision and mission that linked to six strategic priorities of culture, enrichment, community, environment, prosperity and recognition. Along with this was a set of Guiding Principles to serve as the foundation for the development of the proposed program design. Some constraints were acknowledged in retrospect such as the lack of a system to track activity or pledges and the risk and benefit of incenting certain behaviors.

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