

# Health, fitness and the bottom line

Taking steps to improve productivity and performance in higher education



## A way forward

The aging of the U.S. population is gaining national attention, especially within higher education where the trend is particularly pronounced.<sup>1</sup> Between 2000 and 2010 the proportion of all professors age 65 and older nearly doubled, and their median age now surpasses all other occupational groups.<sup>2</sup> Many faculty and staff are reluctant to retire from positions that provide significant financial and psychological rewards.<sup>3</sup> Unfortunately, as they age, their productivity appears to decline.<sup>4</sup> The types of programs discussed here can help institutions maintain productivity among aging employees who want to keep on working.

In the first paper of the Aging Workforce Series, we reviewed important research undertaken by the University of Iowa (UI) Center on Aging. Its survey of more than 200 American universities and colleges explored how institutions are addressing the financial and productivity challenges created by a rapidly aging campus workforce. The UI researchers found that most institutions lack a cohesive, strategic approach for dealing with these challenges. The researchers presented four tactical pillars to build a strategic plan: health and fitness programs, workplace and scheduling accommodations, retirement counseling and employee assistance programs, and retirement pathways. This paper examines the health and fitness pillar. Additional papers explore the other pillars, with a similar focus on helping leaders take a strategic approach to managing their aging workforces and the financial challenges they present.

## Health and fitness make financial sense

Health and fitness programming offer myriad benefits: improved work output, decreased health insurance payouts and reduced disability leaves.<sup>5</sup> In fact, in hopes of maximizing the many benefits of health and fitness programs, some academic institutions have taken the extra step of hiring a consultant to restructure their health insurance plans to provide health and wellness incentives as a means to reduce overall health expenditures and improve the health status of employees. Over the next decade, as the academic workforce continues to grow older, such efforts will be even more critical.<sup>6</sup>

As part of the UI survey analysis, campus-based health and fitness programs were sorted into two broad categories: classes and seminars; and promotion and prevention services. Every successful health and fitness program contained these two elements.

### Classes and seminars

**Set the bar low, but not too low:** Gear fitness classes toward aging employees or employees new to exercise. Build confidence and enthusiasm by tailoring low-impact classes—such as Zumba Lite, water aerobics, chair aerobics, yoga or Pilates—to a variety of abilities, and market these classes by providing clear descriptions about the class routines and schedules. Also, use institutional newsletters to promote programs and include testimonials from participating employees.

**Organize topical seminars:** Aging employees often value classes on various health-related topics, such as “How to Maintain a Healthy Back” and “Taking Care of Your Aging Parents.” These seminars raise awareness and understanding and can help employees manage problems before they become crises. On campus these seminars could be free; if offered off campus, the school could reimburse employees.

**Team up with the community:** Not all campuses have the capacity to develop or maintain a curriculum of exercise classes and information seminars, and not all aging employees want to participate in these activities on campus. They might prefer to participate closer to home,



where they can go before or after work. With this in mind, campus leaders should consider partnerships with local fitness and healthcare organizations. Such partnerships typically involve campus subsidies and joint marketing efforts.

### Promotion and prevention services

**Get some fresh air:** Campus walking and biking trails, bike exchanges, accessible transportation, and easy-access walkways and building entries encourage individual mobility.<sup>7</sup> This healthy campus environment encourages employees to organize early-morning or lunchtime walking groups or to bike to their cross-campus meetings.

**Check everyone's vitals:** Screenings, assessments and other health-promotion activities can be very effective. Campus-based flu shots, basic hearing and vision-screening tests, nutritional counseling, and wellness fairs bring attention to health issues and encourage aging employees to take an active role in managing their own health. Raising awareness improves individual health and also benefits the institution by reducing healthcare costs over the long term.<sup>8</sup>

**Manage chronic conditions:** Diabetes management programs, case-management services for long-term care, and accessible occupational and physical therapy provide benefits to aging employees, as well as the institutions, in terms of greater productivity and decreased

### Case in Point:

#### Western Washington University makes health and fitness a priority<sup>9</sup>

Once the administrators at Western Washington University committed to overhauling their wellness program, the campus community responded enthusiastically and achieved extraordinary results, according to Cheryl Wolfe-Lee, the university's Work-Life Director. "You need an administration who is presenting employees with good choices and who understands the business principles of wellness programs: You keep people healthy. They come to work with a healthy mind, body, and spirit. It's the kind of place where people want to be working."

Western Washington also recognized the importance of having a dedicated staff member to oversee health and fitness classes for aging employees. In fact, the university recently hired a full-time disability-management specialist as well as a health-promotion specialist to address the increasing demand for health and fitness programs. "The average age at WWU is over 50, so about three-quarters of our programming is designed with wellness of aging workers in mind," says Kaylee Nightingale, a Health Promotion Specialist at the university.

By coordinating multiple departments, WWU has developed unique programs for aging workers. The school now provides training for employees returning to work after a disabling accident, and offers counseling to individuals who face chronic health issues. Nightingale is also coordinating with departments to organize affordable, on-campus fitness classes.

Combined, these efforts have helped aging employees achieve better wellness. For example, Tracey Bertels, a WWU employee, says she's lost 40 pounds since beginning the university's fitness and health programs. Her work, energy and quality of life have all improved. "It's made a huge difference in how much work I produce, and how I feel about myself. I can do things I haven't been able to do in a long time," she says.

healthcare costs. Institutions can also facilitate on-campus networking for people with similar conditions or situations, online blogs with an “aging topics” section for fitness and health program participants, and partnerships with local healthcare providers.

### Get off to a fast start

An institution needs a well-crafted implementation strategy for its health and fitness program to achieve broad adoption. Researchers at UI found that the most successful implementation strategies share three common traits: direct communications, incentives to increase engagement, and a commitment to track results.

### Reach out with direct communications

Launching a health and fitness program requires an effective communications strategy. Targeted messaging, regularly delivered through multiple channels such as emails and campus newsletters, improves program participation and individual wellness. This messaging should include details about program offerings, eligibility and participation requirements. These channels include:

- **The Internet:** Employers can target employees via the wellness section of an institution’s intranet, through targeted emails, through the website of the institution’s insurance vendor, and in the form of webinars, podcasts and blogs.
- **In person:** Employers can also deliver these messages face to face at employee orientations with an HR specialist or fitness and health program coordinator, as part of a regular review with a supervisor, at benefits seminars, at health and fitness fairs, and via an on-campus lecture series.
- **On paper:** Finally, some audiences still prefer messages in print, whether in the employee handbook, in an institutional newsletter, or through fitness and health program promotional fliers and calendars.

#### Case in Point: California State University, Fresno, gains high participation with on-campus screenings and promotions<sup>10</sup>

The California State University, Fresno, has combined a Wellness Expo with its annual Benefits Fair to promote the health benefits of keeping active and stress free. Nancy Petenbrink, Director of Employee Assistance and Wellness, says employee participation in, and satisfaction with, these events have run high.

As part of the expo, the university brings in guests, including massage, yoga, tai chi, and Pilates professionals; recreation center representatives, caregiver services providers, natural foods markets, nursing students providing blood pressure and biometric measurements, and more. Charitable organizations, such as the American Lung Association, provide information to attendees and bring attention to health conditions.

Cornell University, for example, offers webinars, podcasts, and video tutorials pertaining to heart health, weight loss, back and spinal care, and other age-related health issues. In addition, there are numerous fitness classes for aging workers.<sup>11</sup> Meanwhile, Oregon State University's website offers wellness categories with a separate link for aging employees under each category. The website also offers many external links to encourage aging employees to get in touch with a wellness coordinator (see "*Case in Point: Oregon State University taps the power of direct communication*").<sup>12</sup>

Ideally, communications will be motivational and morale-boosting to spur participation and instill a culture of wellness at the institution.<sup>13</sup> For example, a school might launch and promote a wellness competition through these communication channels that aims to reduce the average body mass index (BMI) among participating faculty and staff.

### Engage and entice employees with incentives

One tactic to engage and motivate aging employees to join fitness and health programs is to offer incentives, such as free or discounted memberships. To boost participation, course descriptions and enrollment processes need to be simple. This includes flexible scheduling options, and offering easy access and comfortable accommodations in fitness facilities.

At Ball State University, the goal is to design healthy practices to span a lifetime. The university has improved engagement simply by compiling a central list of available activities and coordinating what is already offered at the school. For instance, The Fisher Institute at Ball State University offers academic programs designed to help employees understand healthy aging practices. And, in affiliation with the Community Center for Vital Aging, the institute offers technology classes, social events and physical activities designed for those age 50 and older.<sup>14</sup>

A word of caution, however, when designing incentives: Institutions must be careful not to run afoul of various federal and state regulations (ADA, 1991<sup>15</sup> ; HIPAA, 1996<sup>16</sup>). According to the Office of Disability Employment Policy (2009), when structuring wellness program incentives institutions must meet several criteria.<sup>17</sup>

#### Case in Point: Oregon State University taps the power of direct communication<sup>18</sup>

Oregon State University's website offers wellness categories with a separate link for aging employees under each category. In addition, the website prominently offers many external links for aging employees and provides several opportunities for anyone using the website to get in touch with a wellness coordinator through other channels.

A turning point for the school's health and fitness initiative occurred in 2008 when it won a grant to develop the "Mastery of Aging Well" program, which is now offered through community organizations, online and mail-order DVDs. It has vastly improved campus health, as well as the health of aging Oregonians across the state. Program volunteers are trained to facilitate healthy aging discussions, field concerns, and refer participants to appropriate resources. The lessons from this outreach program are then incorporated into the Oregon State University Center for Healthy Aging Research.

- Offer the incentive programs to all employees.
- Make sure waivers are available for, and disclosed to, all people for whom it is not medically advisable to comply with the standard wellness program.
- Ensure incentives do not exceed 20% of the total cost of the health plan to the employee.
- Maintain compliance with privacy (HIPAA) and disability (ADA) laws by making certain an employee's personal health information is not revealed to the employer.

### Set your goals and measure results

Institutions must set clear goals for their health and fitness programs and then track results. If a school does not articulate goals and monitor performance, it's difficult to know if the program is effective. These goals might include increasing program offerings, providing access to all employees, increasing morale and productivity, and decreasing absenteeism and disability claims.

Measuring outcomes is not always easy and can take time, which makes having dedicated staff so important. A campus-wide survey, for instance, could gather information about employees' level of awareness for different fitness and health programs, how many people participate in these activities, and how their participation has influenced their work habits. These findings can help refine the programs and further improve outcomes, but they do require resources.

For example, West Virginia University Hospitals conducts an annual wellness survey to track participation and satisfaction with the wellness program. This practice serves the dual function of tracking program metrics and fostering awareness for the wellness program itself. Dave Harshbarger of the Health Sciences Campus at WVU uses these results to refine future programming and campus needs. In fact, the annual survey has been so helpful that WVU is planning to conduct the survey three times a year to try to reach more participants.<sup>19</sup>

By rigorously tracking results, WVU can pinpoint the program's financial benefits—with encouraging results. Participants in the program tend to be slightly older and have more chronic conditions than non-participants, but the survey indicates that their health is actually being managed better. In the last three years participants have saved \$2.9 million in claims costs compared to non-participants, and the costs of medical care for participants rose 10% versus 24% for non-participants.<sup>20</sup>

### There's no better time to get better

As noted earlier, educational institutions face significant challenges as their workforces age. Lowered productivity and higher healthcare costs are among the most significant of these issues. Somewhat surprisingly, many schools have either ignored these challenges or tackled them in piecemeal fashion. But as their workforces get even older, this approach will no longer suffice. Institutions need to develop a more strategic approach to managing the wellness of their aging workforce in order to keep them happy, healthy and productive.

Leaders cannot skimp on this effort. It will take a commitment of money, time and staff. But the rewards will likely be significant. By implementing health and fitness programming, and encouraging aging employees to participate, schools can improve the quality of life for employees and improve their own bottom lines by lowering healthcare costs and boosting productivity. Some institutions of higher learning have already embraced this philosophy, and they offer others a coherent set of best practices for designing health and fitness programs.

#### A checklist for getting started

Creating or improving a health and fitness program geared toward an aging workforce can seem a daunting challenge, but done right it is quite manageable. Here's a checklist for getting started.

- Propose to institutional leadership—including administration, faculty and staff councils, campus health officials, and human resources specialists—that the school needs a health and fitness program for aging workers.
- Form a working group to assess gaps in the current fitness and health programs, and gather ideas and information about what improvements can be made.
- Survey your institution and estimate health and fitness programming needs for aging employees.
- Appoint a program manager and staff to design a health and fitness program for aging employees, including a direct communications strategy and incentives to engage them.
- Develop an implementation strategy for the health and fitness program with adequate time to foster awareness and engagement across campus.
- Create a measurement and evaluation process to track participation and retention rates, individual outcomes and institutional benefits.
- Continue to refine the health and fitness program and anticipate future programming needs, such as expanding off-campus partnerships and creating long-term fitness and health program alliances.

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