THE SLOAN CENTER ON aging & work AT BOSTON COLLEGE

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Executive Case Summary Series

# HEALTH & WELLBEING
## *And The Prism of Age*

### THE EMPLOYER LEARNING CIRCLE

The Employer Learning Circle provides timely resources to participating employers who are pioneering new responses to the aging workforce, and offers opportunities to accelerate understanding of the workplace response to the changing age demographics of the workforce through access to information about new and innovative practices as soon as these practice experiences unfold and findings emerge.

### CASE METHODOLOGY

For this study, seven leading employers were asked to "scan" their organizations and evaluate their health & wellbeing strategy and programs through the lens of age. Each employer then selected one "age-responsive" promising health & wellbeing practice to explore in an extensive interview conducted by The Center.

### INTRODUCTION

Twenty-first century Employers-of-Choice understand what motivates employees and are committed to developing 21st Century solutions to recruit, retain and engage a diverse, multi-generational workforce. The Center's Quality of Employment Framework (Pitt- Catsouphes, et. al. 2007) as seen in Fig 1 focuses on eight important dimensions of an Employer of Choice Strategy. One of these dimensions, Wellness, Health & Safety Protections, while always important to employers and employees alike, has become a significant driver of employee engagement in the 21st century. A 2003 attitude survey of over 10,000 employees in 14 organizations conducted by the Institute for Employment Studies (IES) showed that the strongest driver of employee engagement is a "sense of feeling valued and involved" and a key component of that is "the extent to which an organization is concerned for employees' health and wellbeing." (Robinson D, et.al, 2004.) Broadly speaking, 20th century Health & Welfare programs were largely insurance focused, usually including an employer sponsored medical and dental plan, some form of life insurance, short and long term disability, perhaps a health savings account and a 401(k) plan that has changed.

Leading employers, such as those highlighted in this case study, know that Health & Wellbeing programs have emerged as key recruitment and retention tools used to attract the "best and the brightest" candidates, from entry level to the executive suite. Most employers and are offering innovative


health and wellbeing practices as a way of distinguishing their companies as Employers-of-Choice.

Part I of this case explores emerging strategies that leading employers are utilizing to position their health & wellbeing portfolios and highlight their organization-specific approaches. Key organizational concerns are identified as drivers of the strategic emphasis on health & wellbeing. Part II takes a deeper look at seven promising practices, and Part III includes an assessment tool which can be used to scan an organization in regard to four key health & wellbeing concerns and evaluate how that organization is addressing the four dimensions of age as they relate to current Health & Wellbeing programs.

## I. EMERGING EMPLOYER STRATEGIES

*"Taking care of your health portfolio and your wealth portfolio go hand in hand."*

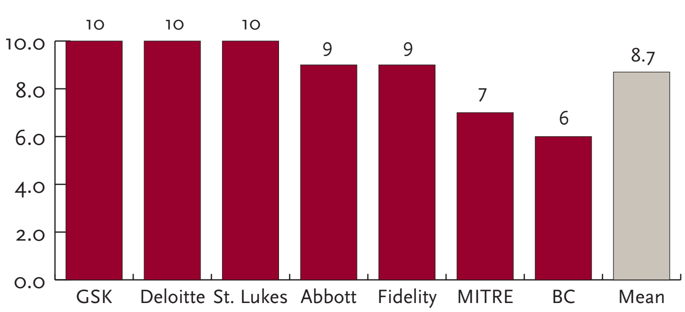
Fidelity Investments

As part of the Employer Learning Circle Health & Wellbeing Pod, seven organizations were asked how they were positioning their current health and wellbeing strategies and what role age played in developing those strategies. These employers created programs that were relevant across the life span of their employees and were concerned that each health & wellbeing benefit met the differing needs for every aspect of age. For example, one organization's health & wellness portfolio is branded, "Find Your Fit," with a goal of assisting employees in finding the programs and benefits that are most appropriate for their chronological age, life stage, and career stage.

### Approaches

Each participating workplace has a health and wellbeing strategy and mission or vision statement that drives their decisions about what programs they offer. When asked to rate how strategic their company's approach to health and wellbeing is on a scale of 1 to 10, with 10 being very strategic, five out of the seven participants ranked their company's approach a 9 or 10 and no one scored their approach lower than 6, for an average rating of 8.7 (see Figure 1). Clearly, health and wellbeing has emerged as a significant business driver in the 21st century for these employers.

Figure 1. How Strategic is your Company's Approach to H&W?




The health and wellbeing strategies of each organization drive their decisions regarding program development and offerings, but organizations differ somewhat in how their programs address the various aspects of age.

**Deloitte.**

- Deloitte believes that one of their greatest organizational strengths is support of personnel's individual needs and goals. This is reflected in their approach to health and wellbeing, which offers a wide variety of health and fitness programs that focus on individual choice and flexibility.

**Abbott**
A Promise for Life

- Abbott takes a patient-centered, data-driven approach to their health and wellbeing initiatives that are branded, "Live Life Well." They looked at what was driving health care costs and developed programs that could improve employees' health and reduce the complications of health risks and disease. Abbott's goal is to help employees become better-informed, empowered, and engaged health care consumers.

**BOSTON COLLEGE**

- Boston College's approach to health and wellbeing is guided by their Jesuit philosophy, which promotes the integration of the intellectual with personal, ethical, and service to others. They are currently focusing on new ways to help create a healthier workforce of all ages which can be of service to others at every life and career stage.

**Fidelity INVESTMENTS**

- Fidelity Investments takes a "Health meets Wealth" approach to their health and wellbeing programs, using terms like "invest in your health" to support strategy. Their goal is to help employees "connect the dots" between health and wealth by encouraging them to look at how they manage their health and risks, how they save or spend their health capital, how they make plan selection and plan utilization decisions, and what kind of preventative efforts they take now which will impact their health and finances in retirement.

MITRE

- MITRE's strategy is branded "Embrace Your Health." This program encourages their employees to take charge of their wellbeing by adopting healthy lifestyles at every life stage, taking steps to exercise more, eat healthier, and manage stress.

gsk GlaxoSmithKline

- GlaxoSmithKline concentrates on keeping their workforce healthy by focusing on the top three risk factors: activity, nutrition, and stress, with the goal of moving their employees down the risk continuum. Their health and wellbeing initiative is branded "Generate," and focuses on each employee's individual responsibility to make healthy changes and achieve their personal health goals.

St Luke's

- St. Luke's Regional Medical Center is Idaho's largest nonprofit community health system whose mission is "to improve the health of people in the region." They offer the Wellness & Tobacco Challenge program which incorporates an "age-neutral" strategy and provides semi-annual bonuses to employees who meet designated health and tobacco criteria.

While each of these organizations approach health and wellbeing in their own unique way, all agree that they cannot rest on the laurels of a successful program but must constantly evaluate existing programs and their employees' changing needs.

## Business Case

Each participating workplace has a health and wellbeing strategy and mission or vision statement that drives their decisions.

Just what is driving these leading employers to give so much time and focus to health and wellbeing? There were three consistent answers that all seven organizations shared:

- ⇨ Lower costs
- ⇨ Recruitment
- ⇨ Employee Engagement & Retention

## Lower Costs

Healthcare costs are a major concern. Since 1999, employment-based health insurance premiums have increased 120%, compared to cumulative inflation of 44% and cumulative wage growth of 29% during the same period (The Henry J. Kaiser Family Foundation, September 2008). Of the seven employers interviewed for this study, five had one year health insurance premium increases above the nationwide average of 5% in 2008.

Health insurance expenses are the fastest growing cost for employers. Unless something changes dramatically, health insurance costs could eventually overtake an organization's profits (The McKinsey Quarterly, September 2004). A healthier workforce yields lower health insurance premiums. As a result, leading employers are looking for new and innovative ways to provide appropriate health and wellbeing programs that will create a healthier workforce.

One of the ways the employers are attempting to create a healthier workforce and quell rising costs is by emphasizing the "wellness" aspect of health, offering programs that fit the needs of employees at every age, career, and life stage. Deloitte offers personnel the ability to use the employee Health and Fitness Subsidy to defray the cost of purchasing a Wii Fit for their home. They understand that in order for wellness programs to succeed in creating a healthier workforce, they must meet a variety of individual and lifestyle needs from subsidizing gym memberships to walking clubs, yoga classes, or exercising at home.

## Recruitment

Offering a compelling portfolio of health and wellbeing programs is one of the most important recruiting tools a company has to engage top talent. Candidates at all life and career stages are more concerned about their health, their future, and their wellbeing than ever before, and want to know that a prospective employer is concerned about those things and offers robust health and wellbeing programs at a reasonable cost. All the organizations participating in the Learning Circle Pod are addressing these concerns:

- MITRE believes they "must attract, develop and retain the best and brightest people" in order to achieve their mission. As a result, they offer a robust suite of health and wellbeing programs that focus on maintaining and "improving the health and wellness of their employees."

- Deloitte strives to be "the premier professional services organization." They believe that offering outstanding health and wellbeing benefits is "not only the right thing to do; it's a great recruitment tool" that adds to a compelling hiring package that enables them to hire top candidates.

- St. Luke's Green Initiative for Environmental Health had a surprising outcome. With a raised awareness of environmental issues so prevalent today, this program has been embraced by employees and has been a positive factor in hiring new employees. Some new hires have even said "it was part of the reason they chose the company."

## Employee Engagement & Retention

Employee engagement is a leading factor in employee retention. Savvy human resources professionals know that failing to engage employees consistently over their tenure with the organization means potentially losing them to the competition. Mercer's 2007 research study of working adults from a cross-section of industries in 22 countries showed that many employers' focus has moved to employees who are "genuinely engaged in the work and mission of the organization and willing to expend extra effort to help the organization succeed" (Mercer, 2007). If the research shows that organizational success and stability depends on the effective engagement of employees, how does an organization create an environment where employees are engaged?

A 2007 study of employee benefits trends "reveals a strong correlation between benefits satisfaction and job satisfaction. Among employees who are 'highly satisfied' with their benefits, 80% indicate strong job satisfaction, up from 65% in 2005" (MetLife, 2007). In *Engaging the 21st Century Multi-Generational Workforce*, a recent study by The Sloan Center on Aging & Work, the findings suggest that employers who want to enhance employee engagement should consider how to update their assumptions about the importance of the quality of the employment experiences they offer to employees, including a focus on health and wellbeing (Pitt-Catsouphes, 2008). Clearly, to remain competitive and keep employees engaged over the span of their careers, HR professionals must create innovative and effective ways to retain talent. Leading employers interviewed for this study realize that they must be ever vigilant about engaging their employees. One of those ways is by offering a powerful portfolio of health and wellbeing programs.

- GSK promotes their portfolio of health and wellbeing programs for every stage of an employee's career, from personal resilience workshops particularly appropriate for early career employees, to programs for later career employees that help them find their passion "so they can renew their career based on what they are passionate about."

- Since Abbott has a large number of long term employees, their health and wellbeing approach is to "look at the long term picture" and not just what a program is "going to save us today." Abbott is able to balance investments with programs that produce a positive ROI within three to five years, focusing on improving both short term and long term health. In regard to health and wellbeing programs, the employee satisfaction level is over 90% which is a significant contributor to their high employee retention rates.

Boston College has distinguished itself from other local universities by continuing to offer retiree healthcare benefits; this one offering has significant positive impact on long term retention of employees. Fidelity Investments sees their investment in health and wellbeing programs as "an integral part of their business strategy," recognizing the need to correlate employee (and member) health and wellness to business results, as well as their HR strategy, including recruitment, retention, and employee engagement. Fidelity has invested significant time developing their healthcare strategy and incorporating health and wellness into their culture. One example is Fidelity's pilot onsite Health and Wellness Centers. These are offered at some other financial services firms and Fidelity viewed their pilot Centers as an opportunity to maintain competitive benefits as well as a very tangible way to demonstrate the importance of prevention and health and wellness within the corporate environment.

## Age

While the link between health and wellbeing programs and employee engagement may be obvious, interviews revealed that age is a far more complex issue. One thing is certain; making assumptions about groups of employees based on their chronological age can be fraught with error. Using the Sloan Center's "prism of age" framework, health and wellbeing programs at leading employers were examined to determine just how "age responsive" they are. Do they consider the needs of employees of every age, life stage and career stage? Consider these points:

- We can no longer assume that workers advance through life and career in predictable paths – age, life-stage, and career-stage no longer map neatly with each other. (Sloan Center on Aging & Work Age & Generations Study, 2009)


- The span of ages within different career-stages is quite large. In a recent study of 2200 employees, the ages of those who reported being in early-career ranged from age 17 to 61 years; mid-career, from 23 to 62 years; and late-career, from 28 to 81 years! (Sloan Center on Aging & Work Age & Generations Study, 2009)

An individual's chronological age does not necessarily predict their career stage or life stage and within generations there are varying differences between early and late members of that cohort. For example, a 45 year old man may be in an early life stage as a new father but he may be at a mid or late career stage. Yet, they have similar health and wellbeing needs. This all has significant impact on what types of health and wellbeing programs employers need to offer.

Employers interviewed for this case study are addressing the four dimensions of age in a variety of innovative ways:

- Some have modified their medical plans to offer free annual physical exams that are tailored to match American Medical Association guidelines on what screenings should be done at what chronological age. Companies that implement this recieve positive feedback from their employees.

- One organization offers infertility centers of excellence that look at the entire spectrum of an employee's needs. They consider chronological age, life stage, and career stage in the counseling and programs offered.

- Another organization has lowered costs for early career, under 25 year-old employees, to get them engaged in utilizing the organization's benefits. They have also addressed later career and life stage concerns by developing phased retirement programs and offering post-retirement healthcare benefits.

- Some organizations address the age issue in yet another way, designing a range of programs that enable employees to access the benefits that are appropriate at their particular life, and career stage and participate at their own pace and comfort level.

**How old are your employees . . . really?**

**Chronological age** is a proxy measure for age-related individual human development (physical, social, emotional, etc.).

**Career-stage** designation is a way of thinking about experiences that mark the accumulation of knowledge, competencies, skills and social capital related to a particular type of career or line of work.

**Life-stage** refers to an individual's development as s/he moves through life-course experiences (often indicated by markers of life events and transitions, such as marriage or the birth of children, which connect us to our social world).

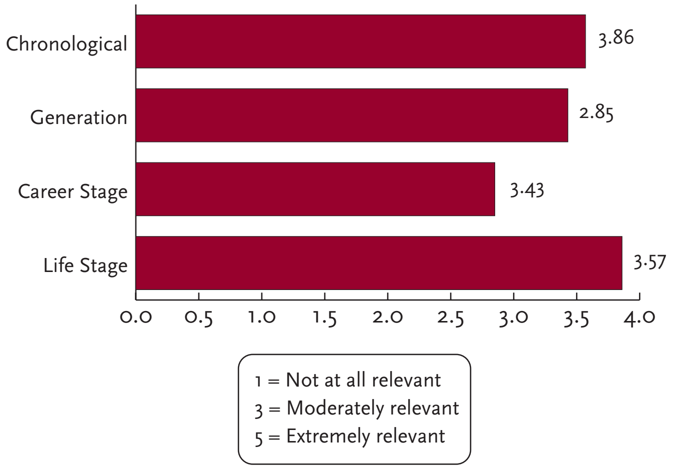
**Generational** influences refer to the societal influences (such as economic circumstances, historical events, and dominant cultural values) that have a sustained impact on the way large groups of people see the world and make meaning out of their experiences.

The Prism of Age may also help employers tailor the way they communicate new and existing programs to their employees. Many utilize web-based technology to reach out to and engage younger employees. Fidelity realized that the images used on their benefits sites did not include a complete range of ages; they quickly stepped in to ensure that images of young and older workers were included as well as everything in between.

*"This is something that is becoming standard in the industry - to promote wellness through the lens of age. We can't ask people to take proper care of themselves if we don't give them the right tools."* - Deloitte

Organizations interviewed for this study were asked to rate the relevance of the dimensions of age for one of their new or innovative health and wellbeing programs. In every case, organizations rated at least three of the four dimensions of age as at least moderately relevant and overall, life stage was considered most relevant. Figure 2 reflects the mean score for each of the four dimensions of age. Perhaps most notable is that chronological age did not surface as the most relevant age factor in regard to these programs.

Figure 2. How relevant were each of the following age dimensions in the development of your H&W program?




The practice examples that follow have been selected as Promising Practices of how leading employers are successfully promoting “age responsive strategies” regarding the health and wellbeing of their workforce.

## II. PROMISING PRACTICES



## II.A. PROMISING PRACTICES

Abbott
A Promise for Life

### Selected Background Information

| | |
|---|---|
| Primary Industry Sector | Pharmaceutical |
| Type of Organization | For-Profit Organization |
| Size of Workforce | 35,000 employees in the United States |
| Average Age of Employees | 42.5 Years |
| Average Age of Retirement | 57 |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| Infertility Centers of Excellence | |
| Description | Centers of Excellence that deliver high quality infertility services to families in need through a mandatory network of certified providers who statistically offer the greatest outcomes. |
| Purpose | Offer world class medical help resulting in better outcomes which decreases spiraling medical costs. |
| Target Population | Women of child-bearing age |
| Launch Date | January 1, 2007 |

### Implementation

In January 2007, Abbott's Benefits and Human Resources teams partnered to institute an Infertility Centers of Excellence Program (COE). The Infertility COE is a result of Abbott's efforts to offer the best health care opportunities to their employees of every age and life stage and to address a significant rise in health care costs largely due to the very high costs of premature and multiple births. In 2005, two-thirds of Abbott's high cost medical claim dollars were for premature and complicated births; many of these high cost and at risk babies were the result of infertility treatments. Although Abbott had traditionally offered premium infertility benefits to their employees, the serious increase in high risk and multiple premature babies created an imperative to find a better way to provide premium infertility healthcare services that were also cost effective.

Abbott felt they needed to move beyond simply providing infertility benefits to offering employees a full service infertility center of excellence program which would help members navigate through their infertility treatment options, provide consistent treatment protocols, and hopefully improve outcomes. As a result, the Infertility Center of Excellence Program was born. The COE delivers high quality infertility services to families through a mandatory network of certified providers who statistically offer better outcomes for mothers and deliver babies with better outcomes and fewer complications.

Previously, to be eligible for infertility benefits, an employee would have to demonstrate at least one year of infertility. With implementation of the COE program, Abbott changed the requirement to six months for women 35 or older, acknowledging not only updated best practice guidelines, but also, that employees of a wider age range are at this particular life stage. COE program services begin with a call with a specially trained infertility nurse who discusses a member's condition and options. Covered services range from meetings with a COE-certified reproductive endocrinologist to a broad spectrum of infertility treatments, to Neonatal Resource Services (NRS) to assist parents with newborn health care issues. NRS also includes a team of trained nurses who monitor mothers and/or babies when necessary through the baby's first year of life to ensure they are transitioned from hospital to any home and/or community resources and to ensure members have access to all the Abbott and community resources available to them and those most appropriate to support the family's medical, emotional and financial needs.

Abbott's vendor partner used a rigorous, evidence-based protocol to select some of the best doctors in the country to participate in the COE, and hired a team of nurses to counsel employees and direct them to COE providers. Before the COE program, employees could see any doctor in the health plan's broader infertility network or could choose to go out of network at reduced benefit levels. With implementation of the COE in 2007, all consults with a reproductive endocrinologist and any infertility treatments must be performed by COE providers to receive coverage.

Initially, there was some resistance from women who wanted to keep their current infertility providers, whether they had previously been successful in achieving a live birth or not, as well as those women in active treatment with non-COE providers. Abbott allowed patients currently in an active treatment cycle to complete that cycle, transitioning them for any future treatments to a COE provider. There were very few appeals from employees who wanted to keep their non-Center doctors once the transition of care was complete.

Support for the program started at the top; initially, the benefits team recommended a voluntary, incentive program for year one. However, the case data was compelling as it identified several examples where better care may have produced better outcomes for both the parents and infants. Senior leadership approved the program as mandatory from the outset.

## Lessons Learned

A well thought out communication plan is key to the success of any new venture. Abbott learned that employees were receptive to a mandatory Center of Excellence if proper due diligence was done to identify doctors who provided quality care and if the program was well communicated in a "holistic" and member friendly manner. Abbott recognized that infertility is an emotionally charged issue and allowed people the time to transition to the new model. Ultimately, they learned that employees are responsive to a mandatory center of excellence concept as long as quality of care can be proven. Members are connected to a doctor who has a proven success rate in delivering healthy, live births with reduced complications. At the end of the day, that is the most important thing for the family and baby.

With research done for the members to find a high quality doctor and support program, a great deal of stress, distraction, and emotional upheaval is removed from the member. Using the COE program assures members have access to doctors who have statistically consistent positive outcomes. Improving birth outcomes has had another significant consequence for Abbott and its employees. Dealing with sick babies puts undue pressure on families and has a negative impact on an employee's productivity at work, no matter what career stage. With healthier babies being born, fewer employees are dealing with the long term care issues that inevitably seep energy and focus. And of course With more positive outcomes, healthcare costs decrease.

If Centers of Excellence can significantly improve outcomes and decrease healthcare costs for emotionally charged care needs like infertility, then they have a greater chance of success when transferred to other diseases such as diabetes or cancer.

## Evidence of Progress

With the rather dramatic shift to this model from a broad-based voluntary network to a mandatory narrower network, and considering the sensitive nature of dealing with infertility and transitioning women from their doctors to COE doctors, it is to Abbott's credit that negative feedback has been minimal. This is evidence of how carefully and thoughtfully they communicated the program's benefits. In addition, participation by a wider range of employees in terms of age and career stage has increased, not only due to the decreased waiting period but also to the ease of use and the time savings that the COE provides employees. Approximately 700 Abbott employees and family members utilize the Infertility COE annually. Age range of usage runs from 20 to 59 years old with 75% female and 25% Male. 53% of those who accessed benefits in 2008 were females between the ages of 30 and 39 and 14% were women between the ages of 40 and 49. These men and women, while at the same life stage, represent a wide range of career stages from early to mid and late career.

Since its' 2007 launch, high risk pregnancies, the number of multiple births, and premature births and multiples born to mothers with infertility treatment have dramatically decreased and health care costs for this population have gone down significantly. In 2008, only six sets of twins and one set of triplets were born and high risk multiple births went down almost 75%. The program saved over $2 million in the first year, while the long-term health of mothers and babies, both physical and psychological, has improved. Abbott expects the numbers of sick babies and high risk multiples to remain lower than baseline levels and the costs of care to continue below prior levels. The number of single, healthy live births and overall program satisfaction should continue to increase.

BOSTON
COLLEGE

## Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Educational Services |
| **Type of Organization** | Not-for-profit |
| **Size of Workforce** | 3,500 employees in the United States and Ireland |
| **Average Age of Employees** | 46 years |
| **Average Age of Retirement** | 66 years |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| **Weekend Marriage Retreats** | |
| **Description** | Weekend retreat for married BC employees and their spouses. Six couples from three different marriage stages (newlyweds, family stage and long term) attend each retreat, which consists of group sessions, private and social time, as well as an optional liturgical experience on the final day. |
| **Purpose** | To foster happier and healthier employees, further the sense of community within BC and support BC's value on the whole person including mental, spiritual and social aspects of life. |
| **Target Population** | Married couples of any age |
| **Launch Date** | 2002 |

## Implementation

As a Jesuit educational institution employing over 3,000 individuals, everything that Boston College does reflects the Ignatian tradition which values the whole person, including the mental, spiritual, and social aspects of one's life. They know that a healthy marriage sustains one's personal life and provides a firm foundation for a healthy work life.

Their Weekend Marriage Retreat program is one example of how the University supports important life stage events and looks at its programs through an "age lens." This program was introduced when a well respected Boston College employee suggested that a program of this type would further the University's values and efforts at community building and support the important link between an employee's personal life and their wellbeing at work. It was determined that such a program was indeed in concert with the values of the University and could prove to be beneficial to employees in any position and the University at large. The Employee Development group worked with leadership to design the program and it was launched in 2002 with University-wide support and enthusiasm.

The foundation of the retreat is a three stage marriage model: newlywed, family stage and long term. Six couples from each of the three marriage stages attend each weekend retreat along with three priests. These three marriage stages do not necessarily perfectly map with an employee's age. Newlyweds who participate in this program might be 20, 40, 60 or older, yet they are all at the same life stage. Long term marriage partners might be 40 or 65; these differences add greater dimension and depth to conversations. Obviously with such wide chronological age ranges, career stages of participants also cover a broad spectrum and add another interesting variable to conversations about marriage challenges offering program participants the opportunity to learn and share valuable lessons from and with individuals of all ages, career stages and in each stage of marriage.

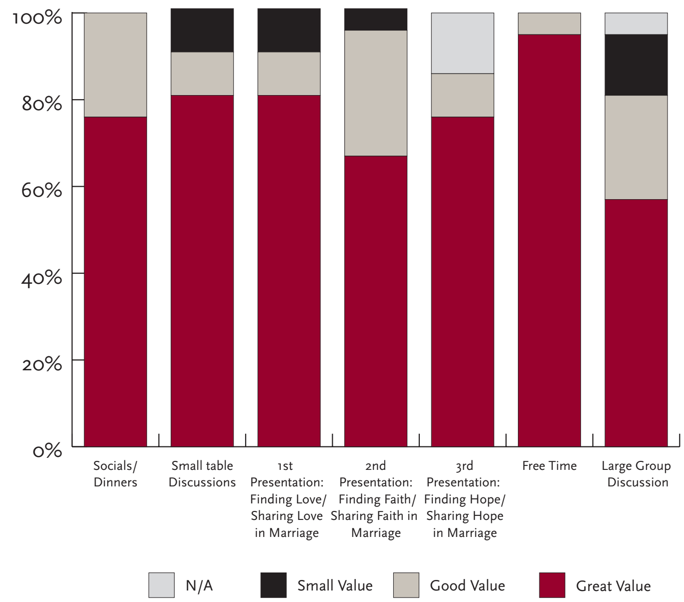
The retreats, which take place in off-campus hotel locations, begin on Friday night and conclude on Sunday afternoon. Each couple is afforded the opportunity for private time in addition to social interaction with other retreat couples. There are three group sessions during the retreat which focus on the values of faith, hope, and charity and what makes or breaks a marriage. These 30 minute sessions are facilitated by a couple from each of the marriage stages who have attended a previous retreat. Following these sessions couples are given private time to do whatever they would like and to reflect on the values which have been discussed. Meals are social times and table assignments are rotated each day so that couples sit with a different group of people for meals. This encourages retreat attendees to make more connections and contributes to the sense of community that is formed over the weekend.

## Lessons Learned

Perhaps the largest challenge Boston College faced in establishing its marriage retreat program was funding. Sending so many couples on weekend retreats multiple times a year can be costly. As a result, each retreat is limited to 18 couples.

An additional challenge to the success of the marriage retreat program was the availability and flexibility of couples to attend. Like most organizations, Boston College employees lead busy lives and have a number of responsibilities. Even if some couples are interested and available for a given weekend retreat, a goal of the program is to have couples representing each stage of marriage at each retreat, including a "return couple" who has attended a retreat in the past. Logistically, this can be challenging. As a result, the program has not had the participation levels the University would like to see, which led to the decision to open the retreat program up to other Jesuit schools in the Northeast.

Figure 3. Weekend Marriage Retreat Satisfaction




## Evidence of Progress

Boston College has collected five years of data on the weekend marriage retreat program in order to track its success and make informed decisions about improving the program. This data includes feedback from employees in the form of satisfaction surveys taken at the conclusion of the weekend retreats. The feedback from all participants has been overwhelmingly positive. In fact, 100% of those who attended the January 2009 retreat would recommend it to a colleague! Furthermore, data from the most recent retreat in 2009 shows that 100% of respondents felt the socials and dinners had either good or great value. Retreat attendees also found each of the three presentations to be valuable; at least 90% reported that each presentation (Finding Love, Finding Faith, Finding Hope) had either good or great value. Please see Figure #3 above for more detailed feedback from the most recent retreat. Those who attended the retreats felt that it gave them a great opportunity to meet and learn from new couples at various stages of their relationships and expanded their awareness of how people at the same life stage but different ages can learn a great deal from each other. For example, one survey respondent stated "It's always a pleasure to reflect on my marriage and share experiences" with other couples.

Boston College plans to continue to monitor satisfaction and feedback of the program in order to make informed decisions about what works and what could be improved upon; however, there is no doubt that the program has been successful in improving the wellbeing of employees.

## II.C. PROMISING PRACTICES

Deloitte.

### Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Professional Services |
| **Type of Organization** | For-Profit |
| **Size of Workforce** | 40,000 professionals |
| **Average Age of Employees** | |
| **Average Age of Retirement** | 59 years |

| **FEATURES PROMISING PRACTICE AT A GLANCE** | |
|---|---|
| **Health & Fitness Subsidy** | |
| **Description** | A subsidy given to personnel to use toward participation in a variety of health and fitness activities or to purchase health and fitness related products, such as treadmills, gym memberships, exercise based video games, etc. |
| **Purpose** | To encourage personnel to be mindful of their health while giving them options and flexibility in how to approach health and fitness at their particular age, life stage and career stage. |
| **Target Population** | All employees |
| **Launch Date** | 2005 |

### Implementation

Deloitte's "Find Your Fit" approach to health and wellbeing is one that stresses individuality because they understand that personnel will have different needs and preferences in how they wish to live a healthy lifestyle depending on age, life stage, or career stage. As a result, Deloitte's health and wellness programs, such as the Health & Fitness Subsidy, allow personnel the flexibility to customize their approach based on what is right for them. Deloitte believes that there is a way for all personnel, no matter what age, capability or interest, to find a way to stay fit.

Their annual Health & Fitness Subsidy can be used in a variety of ways from joining a gym, or hiring a personal trainer, to purchasing health and fitness related products. There is a list of over 40 potential uses for the subsidy, which is updated annually to stay current with health and fitness trends. Personnel receive a maximum of 50% reimbursement for anything on the list of approved expenses, up to $500 per fiscal year.

While the subsidy was originally designed to help personnel pay for gym membership, over time Deloitte realized that their personnel had more diverse approaches to and needs for physical fitness. Personnel now use the annual subsidy for Pilates, yoga, weight management programs, sports leagues and, even recently, video game based exercise instruction was added to the list of approved uses.

This program benefits both personnel and Deloitte as an organization because personnel who take their own approach to fitness are more likely to be successful in staying healthy. Healthy personnel are always an asset because they will likely have lower health care costs, lower rates of absenteeism, and produce higher quality work. Furthermore, health and wellbeing programs such as the Health & Fitness Subsidy are a great recruitment and retention tool for the organization. Benefits such as this make Deloitte a more desirable place to work and show that the organization cares about its personnel.

### Lessons Learned

Through the implementation of this program, Deloitte learned the importance of keeping the process for personnel to participate simple. After working out the tax implications for personnel (this is a taxable benefit), they had to tackle the logistics of approving usage and reimbursing personnel in a timely manner. At first, the process of submitting for reimbursement was quite complicated, requiring personnel seeking the subsidy to fax a form which was reviewed by one department and then submitted to yet another department for reimbursement. The system that has evolved allows personnel to fill out an online form which has made it significantly easier to take advantage of the Health and Fitness Subsidy.

Deloitte also learned that maintaining a very specific list of what the subsidy covers was imperative to the success of the program. When the program began, the list of services and activities covered by the Health and Fitness Subsidy was very general and left a lot of grey areas which became problematic. To remedy the confusion, Deloitte developed a very specific list of what is covered which is reviewed and edited annually. Perhaps the greatest learning was the discovery that they could not predict who would select what type of program. Personnel of all ages might select the same program; choices were highly influenced by their life and career stages.

## Evidence of Progress

The primary way in which Deloitte measures the success of their Health & Fitness Subsidy program is through personnel participation level. Although the participation goal was initially set at 25%, participation has grown every year, with 40% of their personnel of all ages, life stages and career stages currently using the program. Deloitte feels that the program has been a resounding success, exceeding their expectations. In addition, the program has become a great recruitment and retention tool for the organization whose goal is to be the "best place to work" in their industry.

Deloitte monitors feedback on this program through the comment section of their intranet site as well as through email. These comments have been continuously positive. In 2008, Deloitte held a contest for National Employee Health and Fitness Day. To enter, professionals submitted their personal fitness success stories. Over 1,000 Deloitte personnel entered their stories and 56 were chosen to be featured and voted on by the Deloitte population. After 3000 votes, the top 25 were featured on their intranet site; they represented personnel of every age, life stage and career stage. This has been a great success for promoting the program and exhibiting the breadth of positive results that personnel were enjoying due to the Health & Fitness Subsidy benefit, no matter an individual's fitness level or particular interest.

Although Deloitte has not done the analysis of participation in the program and a reduction in their health claims data, the program has been a clear morale boost among personnel and their health care premiums have stayed within industry norms.

## II.D. PROMISING PRACTICES

Fidelity INVESTMENTS

### Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Finance and Insurance |
| **Type of Organization** | For-Profit Organization |
| **Size of Workforce** | 54,144 employees in the United States |
| **Average Age of Employees** | 37 years |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| **Health & Fitness Subsidy** | |
| **Description** | On-site Health and Wellness Centers for employees |
| **Purpose** | To provide easily accessible care to employees, with a focus on preventative health care and health coaching. The health coaches focus on modifiable health risks as well as promoting the broader array of wellness resources available to Fidelity employees. |
| **Target Population** | All benefits eligible employees in Boston, MA or Smithfield, RI. (Centers are located in Boston and Smithfield, RI but all benefits eligible employees are able to partake in Health and Wellness Center services regardless of work location.) |
| **Launch Date** | July 2007 |

### Implementation

Fidelity's pilot Health and Wellness Centers launched in July 2007 as part of the firm's strong desire to focus their health and wellbeing programming on preventative health. Fidelity saw the Centers as an opportunity to provide convenient health and wellness services to employees with a focus on prevention that could help employees access benefits, learn about other Fidelity-specific health and wellness resources that are often forgotten or under-utilized, and ultimately improve productivity and reduce time away from work. Maintaining the competitive positioning of overall benefits was also an important driver in the business decision to pursue these pilot Centers.

Fidelity worked with the National Business Group on Health to conduct interviews with other employers who had on-site health centers, which helped Fidelity to develop a strong model for their own Health and Wellness Centers. Fidelity also worked with an external consulting firm to develop the business case for the program as well as to assist with the Request for Proposals (RFP) process.

Today, the Boston and Smithfield Fidelity locations have a Health and Wellness Center on-site. These centers provide care for acute ailments, similar to what one would expect of a school nurse, and also provides preventative health care, such as offering wellness exams, a variety of immunizations, including travel immunizations and biometric screenings. Compared to other organizations, Fidelity goes one step further in their offerings, providing unlimited access to in-person "Health Coaching." The "Health Coaches" have a health education background and are available to work with people on anything from lifestyle modifications to training for running or managing chronic health conditions or understanding their Health Risk Assessment results.

The Health and Wellness Centers also help to triage employees into other health and wellness programs provided by Fidelity when appropriate. Integration and reporting elements were built into the design of the Center operations to track referrals from the Centers to Fidelity's other health and wellness programs. When employees visit the Center they are told of other programs that they may benefit from which is an additional way that Fidelity promotes the full range of its health and wellbeing programs and offerings. The Center staff also conducts seminars and open houses to educate employees on a variety of health topics.

### Lessons Learned

Because the Centers were launched as pilot initiatives and were only offered in two locations, the initial rollout message from management was to do a soft-rollout with a build over time. As with all new pilot programs, change takes time; just the fact of communicating the Center's existence and offerings to all employees is a major task. They had to have a constant stream of targeted, and to some degree personalized, messaging to reach out to employees of every age, life stage, and career stage to achieve their expected utilization. Fidelity found that despite the fact that the Health and Wellness Centers are located on-site, aggressive marketing is still necessary to keep the Centers and the breadth of services offered front-of-mind for employees. Ongoing communications and marketing is an area of continuous refinement. Fidelity placed a priority on services and service satisfaction over utilization. The expectation around service levels still remains very high and the utilization is now at or near expected levels after a somewhat slow start. Fidelity expected younger and early to mid career employees to use the Centers more than others. To date, Center usage crosses all ages and levels of Fidelity personnel.

## Evidence of Progress

The Health and Wellness Centers have been well-received and considered successful by both employees and business partners. Employees who utilize the Centers are generally very satisfied with the services they receive; Fidelity human resources staff notes that "employees who go, highly value it." Little to no resistance was experienced when developing and implementing the program because Fidelity had solid data to support the concept. Additionally, Fidelity has seen good utilization rates for the program. More specific data regarding visits to the Health and Wellness Centers can be seen in Figure 4.

So far in 2009, the Boston location receives over 20 employee visits per day, while the Smithfield location receives just over 10 per day. On average employees report that they saved 3 hours away from the office by being able to access services onsite at the Health and Wellness Centers.

Figure 4. Summary of Health and Wellness Center Visits

| | | Employees | Actual Visits |
|---|---|---|---|
| **Boston** | 2007 | 7,500 | 2,184 |
| | 2008 | 6,912 | 7,606 |
| | 2009 | 6,050 | |
| **Smithfield** | 2007 | 2,200 | 1,010 |
| | 2008 | 2,278 | 3,475 |
| | 2009 | 2,350 | |
| **Total** | 2007 | 9,700 | 9,190 |
| | 2008 | 3,194 | 11,081 |

Fidelity continues to evaluate the utilization patterns of the Center and the resulting impact to medical plan utilization and population risk. Given these are pilot programs, Fidelity will be evaluating opportunities to expand to other regions as additional data become available.

## II.E. PROMISING PRACTICES

GlaxoSmithKline

### Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Pharmaceuticals |
| **Type of Organization** | For-Profit Organization |
| **Size of Workforce** | 100,000 employees at worksites in 114 countries including 27,000 in the United States |
| **Average Age of Employees** | 42 (in US) |
| **Average Age of Retirement** | 62 ( in US) |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| **Energy & Resilience Program (ERP)** | |
| **Description** | A series of three workshops that focus on Energy & Resilience that is appropriate and beneficial for employees across all ages, career and life stages, and generations. |
| **Purpose** | To address and improve the resiliency of employees at all levels that need to become resilient in all aspects of their lives to flourish in a fast-paced, high stress environment. |
| **Target Population** | All employees |
| **Launch Date** | 2003, 2005, 2006 |

### Implementation

The first workshop in this three-workshop portfolio, Team Resilience, was initially launched in the UK in 2003 as a result of government legislation requiring managers to provide stress related education. It was so successful there that it was rolled out in the US and around the world. As a result of the Team Resilience program, GSK discovered the need for the Personal Resilience and Energy for Performance programs. Today, they form a three practice Energy and Resilience portfolio:

- *Energy for Performance*: a 2.5 day workshop for individuals
- *Personal Resilience*: a 4 hour workshop for individuals
- *Team Resilience*: a 4 hour workshop for teams

By moving health into a self and behavioral awareness arena, GSK fosters employees' ability to take better care of themselves and is also able to get leaders to pay more attention to the health of their employees.

*Energy for Performance*

Initially targeted towards leaders, Energy for Performance is now open to employees of every level and career stage, because the company believes everyone can "believe, engage and achieve and influence others to do the same thing" to improve their health and resilience. In addition to being well supported, the program has also been quite successful.

*Personal Resilience*

The Personal Resilience program addresses the needs of employees at every career stage. For example:

- ⇨ Early career employees need this program because they come into a fast paced, high achieving and rapidly changing organization and they need personal resilience skills to know how to thrive in that environment.
- ⇨ Mid career employees need to learn how to balance work and family so they don't burn out, get frustrated with the demands of their complex lives and possibly leave.
- ⇨ Employees in late career can utilize this program to help them find their passion and plan for the next phase of life.

*Team Resilience*

The Team Resilience workshop crosses all life, career, generational and chronological dimensions of age. Teams of employees in every stage learn about flexibility, self-management, workload, pace of work, engagement and how to work together as a team celebrating the differences that each bring.

Today, all three of these programs are available to employees at every career and life stage because GSK focuses on the "leader in everybody." Their belief is that everyone, of any age, can be a leader and role model for health. Everyone needs to understand how to maintain the appropriate level of resilience and energy to sustain what they have. Employees can put any one of these three courses on their personal development plans. GSK is moving health into the self-awareness behavioral-awareness arena by encouraging employees to take better care of themselves so they can grow with the company. GSK is also encouraging managers and leaders to pay more attention to the need to address health and wellbeing as an integral part of an employee's growth with the company.

Upper management is extremely supportive of all these programs. Over time they have become integrated into the organization's development and management framework. While the program may not appeal to everyone, leaders and managers who do not necessarily embrace energy management as a personal imperative still provide the "power of permission" to their employees and support the efforts to create a healthy environment and healthy practices.

## Lessons Learned

In rolling out this program in the US, the biggest challenge GSK faced was communication. GSK is a large, fast-paced, global company and their employees are very busy. They are still working on improving the ways they communicate information about these programs and constantly searching for new ways to target the programs to key audiences and get the attention of most employees. They use technology, podcasts, webinars, and intranet sites but still feel they need to find ways to keep their employees interested and constantly aware of the need to think about their health and wellbeing. Fortunately, upper management is very supportive.

One constant challenge is the cost of the program both in time and financial commitment. Since Energy for Performance is 2.5 days, it has a significant financial cost as well as a time away from work cost. Due to that cost barrier, whole teams cannot attend this course because every department does not have the budget to pay for the course nor the time to allow large groups of employees to take three days away from their work. While Energy for Performance is a major time and financial commitment, Personal Resilience is a half-day workshop at a much lower cost so that more employees are able to participate.

One of the greatest challenges these programs face is competing with the many other learning and development opportunities that are available to all GSK employees. In order to have employees select one of these programs for the personal development plans, these programs need to remain relevant and results need to be highlighted so employees are aware of their value.

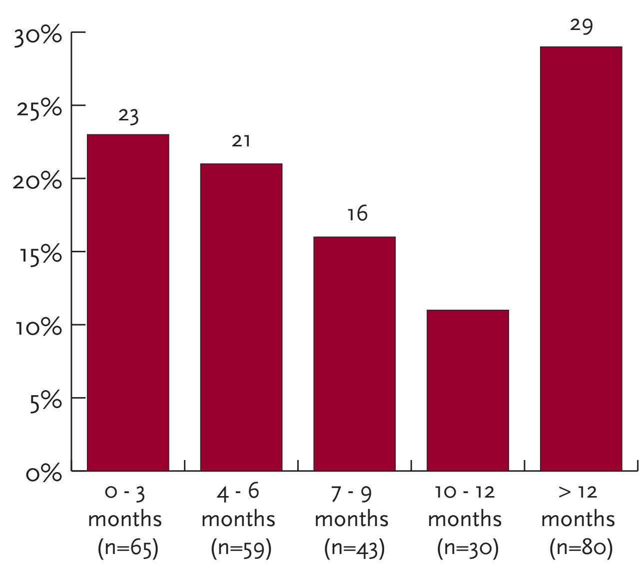
## Evidence of Progress

GSK is vigilant in examining the results of these programs and is constantly evaluating results. According to recent data and evaluations collected from participants, Team Resilience has directly resulted in an 80% decrease in workplace pressures, a 25% drop in work/life conflict and a 21% increase in satisfaction with GSK as an employer.

Early outcomes from the Personal Resilience program indicate improvement in 7 of 10 indices, including tiredness, anxiety, anger, relaxed, positive attitude, employee engagement and self management, but no impact on mental clarity, self-control or self-esteem.
Recent Health Risk Assessment results indicate that the percentage of employees at risk is decreasing, in spite of an aging cohort. Although absolute direct correlation to the Energy & Resilience program has not been assessed, the decrease is coincidental with the institution and wide spread use of these programs.
Results from an early analysis of self-reported survey of Energy for Performance (E4P) participants revealed that 31% of respondents reported sustaining significant to very significant improvement in physical, emotional, mental and spiritual capacity, 12 months after workshop completion.

Percent reporting significant to very significant improvements 3 to 12+ months after attending E4P.

Figure 5. ???




Overall, results support GSK's extensive efforts in creating and promoting this program to their employees.

## Moving Forward

GSK is pleased with the success of their health and wellbeing programs and committed to continuous improvement. They continue to investigate the success of all their current programs, collecting and documenting the data and evaluating what needs to change and where they need to do things differently. Currently, they are investigating several areas for 2010:

- changes to their health incentive design
- incorporating personal health records
- health coaching

They are also planning an environmental scan and examining internal health risk trends and health care costs, which will determine what changes they will effect for 2010 and beyond.

## II.F. PROMISING PRACTICES

MITRE

### Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Professional, Scientific and Technical Services |
| **Type of Organization** | Not-for-profit |
| **Size of Workforce** | 6,660 employees in the United States, Belgium, Germany, Japan, Netherlands, Taiwan, Republic of Korea, and United Kingdom |
| **Average Age of Employees** | 47 years |
| **Average Age of Retirement** | 62 years |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| **Flexible Work Arrangement Program (FWAP)** | |
| **Description** | A program consisting of a number of flexible work options, including: flextime, reduced time/part-time schedules, telecommuting, compressed workweek, job sharing, phased retirement and Reserves at the Ready. |
| **Purpose** | To allow employees to customize the way they work in a way that best suits their life. This fosters a world class working work environment and acts as a recruitment and retention tool. |
| **Target Population** | All employees |
| **Launch Date** | 2001 |

### Implementation

As an employer, MITRE has a history of highly valuing its employees and believing in their ability and need to maintain a balanced lifestyle. A strategic goal for MITRE is to "foster a world class workforce" by enhancing MITRE's "quality of work/life program." After taking a deeper look at health and wellness initiatives, organization leadership decided that such initiatives not only benefit the employees but also are financially prudent for the organization.

The ability to tailor the way one works using the options offered by the Flexible Work Arrangement Program (FWAP) can be a driving force in maintaining a healthy lifestyle. The company believes that a healthy and happy workforce will likely yield greater levels of productivity at every career stage and lower health care costs. Furthermore, a program such as FWAP serves as a tool for recruiting and retaining the best talent available.

In 2000, MITRE surveyed employees and found that they desired more options for flexible work, including the option for telecommuting. By this time, technology had grown to the point where an elevated level of flexibility was possible. Organization leadership had also determined this could be a mutually beneficial program and took the steps to develop and implement FWAP. The program was officially rolled out in 2001 and currently offers the options described in the table below.

### Lessons Learned

The relatively small amount of initial resistance to FWAP came from more "old school" thinkers with "power and control" management styles who felt it was necessary to physically see employees to know if they were working. This resistance faded over time, especially since the President and CEO at the time was more concerned about the well-being of MITRE's employees. His concern was that employees were putting in too much time at the cost of their family life and health. Additionally, as older managers retired, newer ones took their places who were more receptive to the program. Employees asked for more workplace flexibility but management did not understand the extent to which the FWAP program would be utilized. Currently, FWAP is being utilized by an overwhelming majority of employees at all career and life stages in one form or another. At certain life stages, the flexibility provides child care or elder care options. At different career stages, the utilization varies depending upon the needs of the current position. According to MITRE human resources, "just about everyone flexes some day of the week."

One of the major lessons learned in the roll out of the FWAP program was that an intense focus on every possible aspect of introducing the program was key to its success. Even though they knew that employees were hungry for some sort of flexible work arrangements, the program succeeded because they surveyed employees and analyzed the results, got the right people on board, communicated well, trained both employees and managers, ran a pilot, had a good structure, and had the right technology, which all added up to a positive launch.

| Flexible Work Arrangement Program (FWAP) Options | |
|---|---|
| **Option** | **Description** |
| **Flextime** | ▪ Alter normal start and end time each day.<br>▪ Full-time employees work 40 hours per week but choose alternate.<br>▪ Standard workday for flextime may start earlier or end later. |
| **Reduced Hours** | ▪ A regular work schedule of less than 40 hours per week.<br>▪ Part-time schedule may involve fewer hours per day and/or days per week.<br>▪ Regular employees working part-time receive pro-rated benefits. |
| **Telecommuting** | ▪ Does not affect compensation if number of regular work hours is the same.<br>▪ May not be feasible for some jobs that require presence in the office.<br>▪ Intermittent or occasional telecommuting is available for some jobs |
| **Compressed Workweek** | ▪ Fewer workdays within a standard workweek provides full-time alternative; does not affect compensation.<br>▪ Work 4 ten hour days instead of the usual 5 eight hour days.<br>▪ Work 9 days over a two-week cycle<br>▪ 4.5 day workweek: work 4 longer workdays and a half-day on the fifth |
| **Job Sharing** | ▪ Two employees share one full-time job.<br>▪ Each employee works less than a full-time workweek; compensation and benefits are affected. |
| **Phased Retirement** | ▪ Employees aged at least 59 1/2 are eligible if approved.<br>▪ Work a regular part-time schedule (20+ hours but less than 40 per week)<br>▪ May begin benefits from a portion of the MITRE Retirement Program. |
| **Reserves at the Ready** | ▪ Former full-time employees with skills and corporate memory provide dynamic, short term support to critical MITRE projects.<br>▪ Part-time on-call (PTOC) employees; 300 in total, 130 are age 55+<br>▪ Not benefits eligible; may not work more than 1000 hours per year |

## Evidence of Progress

Above all, MITRE has learned that employees who are well cared for are likely to give more back to the organization. Because employees participating in FWAP are able to more effectively navigate between work and other life responsibilities they work better and enjoy working for MITRE more. Employees at the young family life stage appreciate the flexibility the program offers to allow them to adjust schedules when needed. Employees at late career stage appreciate the opportunity to phase out from full-time employment and have options even after they retire. In a 2008 survey conducted by FORTUNE Magazine, MITRE employees reported that the opportunity afforded them for work/life balance as a result of the FWAP program was a major reason they enjoyed working for MITRE.

MITRE feels that FWAP has helped to infuse the organization with a renewed sense of trust. This program treats employees like adults, enforcing the idea that outcome is more important than hours spent at a desk. The program has created a sense of reciprocity— MITRE shows employees that they are respected and trusted enough to use flexible work options, and employees of every career and life stage have an increased respect and trust for the organization.

During the first few years of the program, MITRE focused on trying to understand exactly how people were using the program. For the past few years, they have been collecting more hard data and evaluating usage of the various programs. This data will help the organization to understand which options are the most beneficial and how the program can continue to be improved upon or expanded.

## II.G. PROMISING PRACTICES

St Luke's

### Selected Background Information

| | |
|---|---|
| **Primary Industry Sector** | Health Care Provider |
| **Type of Organization** | Not-for-profit |
| **Size of Workforce** | 7,608 employees in the United States |
| **Average Age of Employees** | 41 years |
| **Average Age of Retirement** | 62 years |

| FEATURES PROMISING PRACTICE AT A GLANCE | |
|---|---|
| **Green Initiative for Environmental Health** | |
| **Description** | A program of diverse initiatives including everything from organization-wide recycling efforts to employee transportation alternatives and educational programming. |
| **Purpose** | To manage St. Luke's impact on the environment, raise employee awareness of environmental health, reduce costs and save energy. |
| **Target Population** | All departments and employees |
| **Launch Date** | May 2007 |

### Implementation

St. Luke's Green Initiative for Environmental Health began as a grassroots effort on the part of a small group of employees who were concerned and dismayed by the amount of waste the organization produced. It has since evolved into a hospital-wide initiative to create a culture of environmental health and awareness at the workplace. The earliest efforts were aimed at recycling cardboard, a material which the hospital uses extensively in all departments. The construction department of the hospital followed suit by beginning to recycle steel and donating building materials to "Second Chance Building Materials Center," a business which makes used building materials available for resale, reducing unnecessary waste.

By November of 2007, co-mingling of recyclable items was allowed and all departments began recycling significantly more often than in the past. At that time, Food & Nutrition Services also joined the effort to be green by using recyclable and compostable table services, such as non-bleached brown napkins.

Today, the Green Initiative at St. Luke's also includes Employee Transportation Alternatives. This program provides employees with incentives to bike, walk, ride share, or take the bus to work. Employees who sign up for the program and either bike or walk to work at least 60% of the time between May and September are eligible for a gift certificate to a bike store or a walking and running store. Employees who chose to carpool receive a 50% discount on their parking space in the garage and those who take the bus can ride for free with their employee ID card. In addition, St. Luke's has bicycle parking as well as shower facilities available to make biking more convenient for those who choose to do so. This benefit is currently utilized by a wide cross-section of employees of all ages, life and career stages.

In addition to these programs, the Green Initiative also organizes environmental awareness events and provides educational programming to St. Luke's employees. Each year, St. Luke's holds an Earth Day event where a variety of vendors share information about the importance of environmental health and awareness. There is also a program called Green Planet Wellness that educates employees about simple activities they can do at home and work to take better care of themselves and protect the health of the planet. Finally, nearly every department at St. Luke's has a "Green Team" representative. These employees represent nearly every age and career stage within the organization. The Green Teem meets regularly to sustain efforts and discuss new ideas to generate interest and participation in the Green Initiative.

### Lessons Learned

One of the greatest challenges St. Luke's faced when implementing the Green Initiative was getting all departments on board. For example, they faced some hesitation from the Housekeeping Department because they thought the recycling initiative would be more time consuming and labor intensive and create storage issues.

In order to overcome these challenges, St. Luke's hired an independent consultant who interviewed different departments about their needs and concerns. This consultant helped the organization determine the best way to make the Initiative work for each department.

**Evidence of Progress**

Overall, the Green Initiative has been an overwhelming success for St. Luke's. Employees have become significantly more aware of their impact on the environment and are happy to recycle and participate in other aspects of the program. Additionally, the hospital has saved over $142,000 on cardboard, and reduces its landfill contribution by 30%. The hospital has begun taking steps to reduce its energy consumption, by installing light switches that automatically turn on/off when someone enters a room. New construction projects utilize green building techniques and meet Energy Star guidelines.

*"St Luke's employees understand the connection between individual , enterprise and societal environmental health."*

As a result of the Green Initiative, St. Luke's has been recognized by the press and received a number of awards including the Boise Enviro–Guard Energy Star award for Meridian Medical Center, BetterBricks Facility manger/operator award, Pollution Prevention award, and the Gotcha in the P2 Act Idaho Gem stars award. The program has been particularly popular with new employees, especially younger employees and those in early and mid-career stages. This has yielded an unexpected positive result. Since environmental awareness is quickly becoming a characteristic people hope to see in an employer, the Green Initiative is serving as both a recruitment and retention tool for the organization.

## III. ASSESSMENT TOOL

When an emerging age-related issue such as health and wellbeing arises, it is helpful to have a focused way to address that issue with your organization. Using a tool that can guide you helps to focus and clarify your thinking and raise and answer questions such as:

- ⇨ How are we looking at this issue or are we looking at it at all?
- ⇨ How would we like to look at it? What does it mean to us and our employees?
- ⇨ How is the age and generation of our employee population impacted by this issue?

The US labor force participation among adults 55 and over is increasing and expected to continue to increase. With this increase in age in the employee population comes an increasing concern about health, aging, and work. The Age & Generations study recently conducted by the Sloan Center concluded that physical health does not vary significantly across age or generation, but does significantly decrease across career-stages and life stages. The study also concluded that assumptions about health cannot be based directly on age.

As this case study suggests, it is important for your organization to regularly assess how you are meeting the health and wellbeing needs of your employees. To assist you in doing that, we have developed a two part tool or "scan":

Part I helps you to understand how your organization is addressing four key Health & Wellbeing concerns:

- ⇨ Absence of disease & injury
- ⇨ An awareness and progress toward maintaining proper diet, exercise and personal habits
- ⇨ A balance in all aspects of life: physical, emotional, intellectual, social, spiritual
- ⇨ Resilience: the ability to recover readily from adversities of life (stress, illness, loss)

Part II helps you assess how your organization is considering the various dimensions of age as it relates to your current Health & Wellbeing programs.

Plan to spend 30 to 45 minutes completing Parts I and II of the Scan, preferably with a group of your colleagues who can assist you in putting your findings into action!

## HEALTH & WELLBEING SCAN REGARDING AGE STRATEGY PART I

| 1. Do your organization's Health & wellbeing programs address: | Yes | No | Rate how important this issue is for your organization from 1 (not at all) to 5 (critically) |
|---|---|---|---|
| Absence of Disease and injury (ADI) | | | |
| Awareness and progress toward maintaining proper diet, exercise and personal habits (PEP) | | | |
| A balance in all aspects of life: physical, emotional, intellectual, social, spiritual (BAL) | | | |
| Resilience: the ability to recover readily from adversities of life (stress, illness, loss) (RES) | | | |
| **Your ratings of these four areas of focus are an indicator of your organization's health & wellbeing priorities.** | | | |

| 2. Now, list the 4 areas of focus above (ADI, PDEP, BAL, RES) in order from highest rating to lowest, then answer the question about each one, following the example shown here: | | |
|---|---|---|
| **FOCUS AREA** | **RATING SCORE FROM ABOVE** | **WHY IS THIS EITHER A HIGH OR LOW PRIORITY FOR YOUR ORGANIZATION?** |
| example: **ADI** | **5** | We have an aging population and a relatively high incidence of diabetes and heart problems. We are extremely concerned about these problems and how they are beginning to impact more than 20% of our workforce which has an average age of 49 years old. |
| | | |
| | | |
| | | |
| | | |

**3. How can you improve the ways you address the high priority areas?**

**3. How can you improve the ways you address the high priority areas?**

**3. How can you improve the ways you address the high priority areas?**

| **Why does age matter?** Today, the workplace needs to accommodate longer lives and a looser notion of age-appropriate social roles to make organizations flexible enough to accommodate alternative work patterns, changing demands, and new possibilities. (Steuerle & Spiro, 1999) If we look at age through a "prism," (Pitt-Catsouphes & Smyer, 2007) we see four different aspects of age: | |
|---|---|
| **Chronological Age** | a proxy measure for age-related individual human development (physical, social, emotional, etc) |
| **Career Stage** | a way of thinking about experiences that mark the accumulation of knowledge, competencies, skills, and social capital related to a particular type of career or line of work |
| **Life Stage** | refers to an individual's development as s/he moves through life-course experiences (often indicated by markers of life events and transitions, such as marriage, the birth of children, care of elderly, which connects us to the social world. |
| **Generation** | refers to the societal influences (such as economic circumstances, historical events, and dominant cultural values) that have a sustained impact on the way large groups of people see the world and make meaning out of their experiences. |
| The relationship between these four different ways to look at age can vary considerably from individual to individual, even though they tend to be related for the mythical "average" person. Employers who avoid the temptation of automatically assuming that age, career stage life stage and generations "really mean the same thing" will be in a better position when they make plans for their approach to talent management and benefits. | |

Complete the following summary chart by listing 3 specific examples of your organization's current Health & wellbeing practices in Column 1 and then answering the age related questions in Columns 2 -5. In the example shown here, the program is a Lunchtime Walking program for employees; each question was answered in regard to that program and how the various aspects of age may apply to the program.

| Column 1 | Column 2 | Column 3 | Column 4 | Column 5 |
|---|---|---|---|---|
| **Current Health & wellbeing Program, Practice or Policy** | **Does chronological age matter?** | **Does life stage matter?** | **Does career stage matter?** | **Does generation matter?** |
| Example: Lunchtime Walking Program | yes | no | maybe | no |
| Example 1: | | | | |
| Example 2: | | | | |
| Example 3: | | | | |

## LEARNINGS

**1. What surprised you about your answers?**

**2. Were one or more dimensions of AGE more or less significant for your organization? Why?**

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10 Will health benefit costs eclipse profits? (September 2004) The McKinsey Quarterly Chart Focus Newsletter

11 Workplace Flexibility: Findings from the Age & Generations Study (January 2009) by Marcie Pitt-Catsouphes, Christina Matz-Costa, and Elyssa Besen

## The Sloan Center on Aging & Work at Boston College

The Sloan Center on Aging & Work at Boston College was founded in 2005. Working in partnership with workplace decision makers, the Center promotes the quality of employment for the 21st century multigenerational workforce. The Center strives to put evidence into practice to improve employment experiences for both employers and employees. We place a particular emphasis on workplace flexibility that supports 21st century ways of getting work done and enhances employees' work experiences. Our multitiered strategy includes combining employer-engaged research and academic rigor with innovative communications. We engage multidisciplinary teams of researchers from around the world to forward three research streams—the U.S. National Initiatives, the State Initiatives, and the Global Initiatives.

The Sloan Center's U.S. National Initiatives partners with scholars and employers across the United States, placing a particular emphasis on workplace flexibility. Together, we explore the intersection of employee preferences with employer practices and chronicle emerging strategies as they evolve. Current projects include analyses of the Health and Retirement Study, Elder Care, Workplace Flexibility, and Multigenerational Talent, and the Age & Generations Study.

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For more information about the Sloan Center on Aging & Work at Boston College, please visit: http://agingandwork.bc.edu.

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