



Organizational Effectiveness Annual Report

A Unit of Human Resources at The University of Iowa

July 1, 2010 – June 30, 2011

Organizational Effectiveness, a unit of University Human Resources, is pleased to share our Fiscal Year 2011 Annual Report. Accomplishments noted throughout the report are a tribute to all the staff members who work in Organizational Effectiveness, as well as the leadership within Human Resources and our campus wide partners.

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Executive Summary

Organizational Effectiveness (OE) is comprised of two integrated functions – Health and Productivity (H&P) and Organizational Development (OD) – that serve individuals and groups to improve their health, performance, and engagement at The University of Iowa. OE works strategically within University Human Resources in support of organizational success through consultative services to campus leaders in the areas of organizational development and health and productivity management. Teresa Kulper and Joni Troester co-lead Organizational Effectiveness.

Achieving performance excellence in higher education continues to be a challenge as we deal with a wide range of issues from individual to organizational concerns. This past year, The University of Iowa completed its five-year strategic plan, “Renewing the Iowa Promise,” of which emphasis is placed on attracting and supporting a

healthy and engaged workforce to achieve organizational excellence. OE provides support to the institution in achieving these strategic goals through consultative services, education and training opportunities, and individual support services. These services are highlighted throughout this report using a balanced scorecard approach focused on organizational vitality, process improvement, quality of service, and financial stewardship.

The University remains committed to strengthen faculty and staff vitality by promoting the health, well-being, and professional growth of all members of the campus community. Organizational Effectiveness supports this commitment through assisting individuals and departments in building and sustaining performance excellence in areas that are critical to personal and institutional success.

Mission: OE works to empower individuals to fulfill their potential by partnering to build a healthy, productive, and engaged UI community that supports a culture of excellence.

Organizational Effectiveness provides programs and services for the UI community. One measure of success for OE is the unique number of faculty and staff who participate in OE services. For fiscal year 2011, OE served 16,694 unique faculty and staff through online programming, and both individual and group services.

Major Accomplishments FY11

Performance

- Personal resilience: Provided integrated services within OE to include counseling, coaching, training, and consultative services in support of individual resilience, productivity and performance.
- Organizational sustainability:
 - Using a systems approach, continually integrate OE services to meet the full need of the client department in the most efficient way. Multiple workgroups are supported, starting with an OD assessment focused on impact to morale, productivity, workload, and work processes.
 - Evaluated and improved Key Performance Indicator metrics for use by University Human Resources and organizational units.
 - Developed Executive/Faculty productivity consulting service.
 - Collaborated with the Integrated Talent Management (ITM) Sponsor Council and the Senior HR Leadership Council to develop a University-wide performance management process to serve as a basis for Integrated Talent Management.
 - Developed new supervisor training and onboarding materials for launch in fall 2011.

Engagement

- Launched and evaluated an online application system for Tuition Assistance, which offers one portal for UI and UIHC staff, improving system efficiency and accuracy.
- Sponsored professional development conferences and offered continuing education units (CEU) to meet some of the needs of licensed professional employees within the state.

- Developed and delivered a pulse survey for organizational units to measure engagement in the “off” years of Working@Iowa.
- Provided a number of Work Redesign services to realign staff and improve efficiencies in units that are adjusting to early retirements, reduced budgets and/or increased service needs.
- Implemented an enhanced flexible work options model to support individual and organizational success.
- Expanded infant/toddler child care services for faculty, staff and students through the campus connected child care model.

Health and Productivity

- Developed a health management dashboard for organizational units.
- Demonstrated participation increases in health management programs (range of 5%-15% increase in utilization for select services, including 1:1 counseling, 1:1 coaching, and resource and referral program).
- Completed an outcome analysis of population health programming linking improvement in health risks with decreased absence rates. Cost savings estimated at approximately \$100K annually, and cost avoidance estimated at approximately \$1.4 million annually.
- Expanded health management programming and services for faculty, staff and students in the new Campus Recreation and Wellness Center.
- Implemented the Recreation Membership Incentive Pilot Program for faculty and staff, with approximate utilization of 2500 faculty and staff in Year One.
- Implemented Healthy Campus Nutrition Guidelines for select campus food service areas, including the development of the U Choose brand.

Major Goals FY12

Performance

- Continually evaluate and improve use of Key Performance Indicator framework for strategic planning and decision making.
- Cultivate and nurture new and existing external business partners (i.e. Iowa Lean Consortium).
- Explore the development of unit-level Lean/Work Redesign expertise across campus.
- Lead implementation of new performance development and management tool through ITM process.

Engagement

- Use social media and social networks to effectively engage faculty and staff in OE programs and services.
- Improve training across campus through enhanced delivery methods and use of emerging technology.
- Implement elder care/aging workforce survey and identify targeted programming and services for an aging workforce.
- Evaluate Working@Iowa format and report design, recommend improvements, and plan implementation for fall 2012.

Health and Productivity

- Expand health management programs within the Campus Recreation and Wellness Center and other campus locations.
- Engage faculty and staff to utilize campus recreational facilities through the pilot membership incentive program.
- Expand implementation of Healthy Campus Nutrition Guidelines and evaluate impact.
- Implement a leadership dashboard for health management metrics.
- Complete outcome analysis on one to two health management programs through use of the integrated data set.
- Develop and implement a pilot health management program with specific behavioral health emphasis related to performance and the impact on health/productivity.
- Implement and evaluate programs to mitigate organizational risk that include Fitness For Duty, Behavior Risk Management, Threat Assessment and Psychological First Aid Training.
- Explore opportunities for various incentive structures related to health management.

ORGANIZATIONAL VITALITY

Goal: Promote the UI as a great place to work and support the retention of excellent people at UI.

Recreation Membership Incentive

In August 2010, the Campus Recreation and Wellness Center officially opened for business providing the University community with a vital resource relative to health and wellness. As part of the University's commitment to the health of its faculty and staff, a 50% recreation membership incentive program was instituted to encourage faculty and staff to use recreation facilities on campus. The response during the first year has been extremely positive, with over 2,500 individuals taking advantage of this opportunity to become more physically active through regular exercise. Additionally, the incentive program has had a positive impact on key health behavioral risk areas, especially as it relates to physical activity. *Figure 1* demonstrates the improvements in UI faculty/staff who are exercising on a regular basis.

The membership incentive has also created an increased interest in health and wellness activities across campus. The Campus Recreation and Wellness Center acts as a gateway to a whole host of health management services. By creating an inviting and appealing facility along with providing quality service, faculty and staff are highly engaged in their own personal health – a plus for the individual and the organization.

Healthy Campus Nutrition

In 2010, University leadership approved implementation of the Healthy Nutrition Guidelines for campus. From these guidelines, the “U Choose” education and awareness campaign was developed to create a guide for faculty and staff in choosing healthy food options at University food service areas. The educational campaign is focused on identifying foods that are low in fat with zero grams of trans fat, low in sugar, low in sodium and made with whole grains and 100% fruit or fruit juice. Food with these characteristics bears the label “U Choose” for easy identification by faculty, staff, students, visitors and patients. “U Choose” was launched in January 2011 with food service areas at University Hospitals and Clinics and University Housing. An initial evaluation of the program this past May revealed that many respondents had noticed the labels, and said it had an impact on their behavior. Plans for FY12 include continued roll-out of “U Choose” in other food service areas across campus.

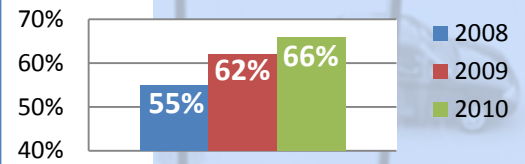


Campus Lactation Facilities

Environmental supports, such as campus lactation facilities, assist campus community members in maintaining a balance between work and family. In 2010, new Department of Labor regulations required 5 of the 30 rooms to undergo remodeling. Additionally, 3 new rooms were made available with the opening of new buildings, bringing the on-campus total to 33. The University is committed to providing this type of support on an on-going basis as lactation rooms are a standard design specification included in all new buildings for campus. Feedback from faculty, staff and students is positive as they transition back into the workplace, indicating this type of support allows them to balance the competing demands of both work/academic responsibilities and family.

Figure 1

Faculty & Staff Physical Activity % engaged in recommended amounts



PROCESS IMPROVEMENT

Goal: Improve organizational performance and drive enhanced measurement of business processes and systems. OE supports organizational performance through consultative services which assist units and workgroups to improve effectiveness.

Threat Assessment – Silos to Integration

The UI Threat Assessment Team (TAT) was established in 2008 and has grown to be a critical campus resource in assessing faculty, staff and student situation/incidents that have potential for violence. The establishment of TAT with Threat Assessment Specialists (TAS), from both Human Resources and the UI Police Department, offers a unique partnership that bridges mental health concerns and public-safety considerations. The TAT team's goal is early intervention and assessment to lessen the likelihood of a violent outcome. Violence deterred is the overarching goal, and the primary method for violence prevention is that TAT specialists assess and guide students, faculty, and/or staff in need to relevant resources.

The TAT team functions across campus using an integrated and coordinated process. TAS are mobile, which allows for accessibility and assessment of concerns in a rapid manner, utilizing advisory resources and making appropriate recommendations in the best interest of the University Community. In developing the TAT team and integrated approach to addressing concerns, silos were eliminated and outcomes for the University improved.

UI Threat Assessment's innovative partnership and state of the art database for tracking threats, have made a difference not only to the faculty, staff and students at UI, but are also established as a model for school districts, business, and social service agencies throughout the state of Iowa. TAT has served the community in 263 cases over the last year, and provided a state-wide training for school and business in developing a Threat Assessment Team.

Business Process Improvement using Lean Methodology

Lean Methodology is a powerful tool to bring together different units that share a common process to collaborate and create a more effective and efficient process. This methodology results in an action plan with accountability and deadlines. OE facilitated a Lean event that involved staff from five areas: Asset Management, Facilities Management, Accounting Services, Business Office, and Controller's Office.

"Thank you for prioritizing the meeting with us. I appreciate your coming over to our office for it. I also am SO happy that our unit can trust your careful and appropriate responsiveness to the needs of our community. I am happy not to have the need to interact with you frequently but you have my gratitude for the intelligence and tracking, along with good interpersonal skills that you bring to your work." Anonymous

"OE staff helped us examine the existing process in an objective way, and creatively but practically envision future changes for all the individuals involved in the Lean review. We are committed to implementing all of the action items identified during the Lean event. When our future state is fully in place, our process will be more efficient, consistent, timely, accurate and transparent. The changes and enhancements will also improve accountability by identifying ownership of various parts in the process. We've found the Lean review process to be an extremely valuable service provided by Organizational Effectiveness."

Selina Martin, Finance & Operations, Associate Controller

QUALITY OF SERVICE

Goal: Exceed customer expectations and enhance opportunities for improving the health, productivity and/or engagement of staff, students, and faculty.

Group Health Coaching Service - Bringing health improvement opportunities to the local work area.

A new service was developed to meet the needs of faculty and staff interested in making health-related lifestyle changes with the support of others. The Group Health Coach Service focuses on accessibility by bringing the service directly to the worksite, support by providing the social support of group members also working on lifestyle improvements, and synergy by creating an environment where healthy habits are encouraged and creates the energy individuals need in making healthy choices. Over the course of the past year, 12 Group Health Coach opportunities were provided on campus serving 82 faculty and staff members. Participants have responded positively to this new service, finding it both convenient and highly motivating.

Supervising Today's Students Certificate Series

A new series was developed to meet the continually changing demands of our diverse employee population and growing student workforce at UI. This series supports UI supervisors in their role of managing students, as well as supporting the University's responsibility for undergraduate success. Within the series, emphasis is placed on the development of skills for individuals who supervise undergraduate students by providing insight and training on how best to lead, mentor and support student employees. During the past fiscal year, 354 classes from the nine-course series were completed by 117 people.

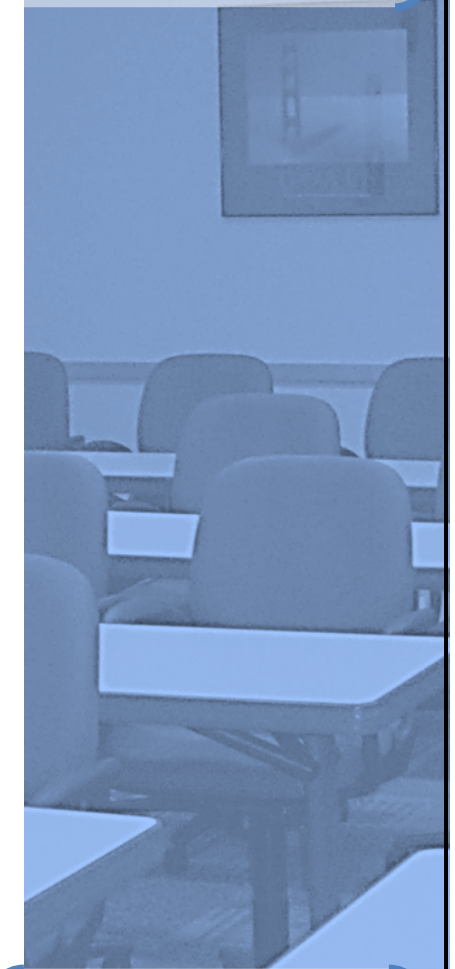
Organizational Effectiveness Consultation

The creation of the Partnership for Alcohol Safety (PAS) – co-led by Vice President Tom Rocklin and Iowa City Mayor, Matt Hayek – is a joint project of The University and The City of Iowa City to identify and advocate for strategies that reduce high-risk drinking and promote a vibrant downtown Iowa City. OE worked with PAS to find unity in a group with very diverse interests by creating a clear organizational structure and strategic plan.

"OE's consultation assistance was needed because the PAS is a large and diverse coalition that lacked clear direction and purpose. Despite its enormous potential to create community change around alcohol, without clear direction, the coalition was at risk of dissolving. Our OE consultant utilized her expertise and leadership skills to guide PAS members in the development of a mission, vision, and values that reflect common ground, shared goals and purpose. She facilitated the development of strategic plan and a committee structure aligned with our goals. As a result, the PAS has developed into a strong campus community coalition with clear direction and committed members who have successfully advocated for several community changes to decrease high risk drinking." Sarah Hansen, Director of Assessment & Strategic Initiatives and Kelly Bender, Coordinator for Campus Community Harm Reduction Initiatives

*"The entire department has been inspired. People are much more health conscious with the foods that they bring in."
"I have lost 20 pounds and my borderline high blood pressure is back in normal range. My physician and I are thrilled not to have to start medication."*

UIHC Radiation Oncology Staff Member



"...Our consultant's composure, vision, and process expertise were a centering presence throughout a potentially difficult process. The time spent on relationship building within the coalition has paid great dividends as we move forward."

PAS Planning Group

FINANCIAL STEWARDSHIP

Goal: Generate revenue as needed, maintain funding through partnerships and demonstrate a return on investment (ROI) for identified services.

Health Management Initiatives - ROI

Health management initiatives consist of a number of service areas that support faculty and staff in their individual health improvement efforts, while positively impacting organizational performance and success. One of the University's goals is to attract and maintain a healthy workforce. Four key components focused on this goal include providing environmental supports, keeping healthy people healthy, lowering risk of the University's "at risk" population and managing chronic conditions. Return on investment (ROI) is regularly measured for many health management initiatives, both from a population health standpoint as well as a specific service analysis. In 2010, changes in faculty/staff health demonstrated a positive change in population health risk migration with a 28% decrease in the high risk group, and a corresponding 18% increase in the lower risk group (See Figure 2). Further analysis of health risk migration identified a link to reduced absenteeism. University data indicates that individuals in lower risk categories use on average 15 hours less sick leave per year as compared to higher risk individuals, resulting in a cost savings/cost avoidance of approximately \$1.5 million annually related to absenteeism alone (See Figure 3).

Highlight: Campus flu vaccinations – In fall 2010, The University provided 12,078 free flu vaccinations to faculty and staff, constituting approximately 67% of our workforce. Flu vaccinations work to prevent the spread of influenza throughout the workforce and have demonstrated impact on absenteeism and health care spending. Benchmark data estimates a per-vaccine ROI of \$83.84. When applied to the University population, the estimated cost savings is \$1.0 million for 2010. Additionally, the flu vaccination campaign is administered at worksites across campus during work time, increasing accessibility for faculty and staff.

Highlight: Employee Assistance Program – OE administers the University's Employee Assistance Program (EAP) through the Faculty and Staff Services Unit. A number of services are provided through EAP, most notably 1:1 personal counseling available to University faculty and staff and their family members. This service is strictly voluntary and confidential, and provides brief counseling for assistance with personal, family or work-related problems. A trained counselor works with individuals to help identify concerns and discuss possible solutions. Providing these services internally creates not only greater accessibility and assistance for faculty/staff members, but also a cost savings to the organization through the use of internal as compared to external providers. Cost savings is estimated at \$100K annually.

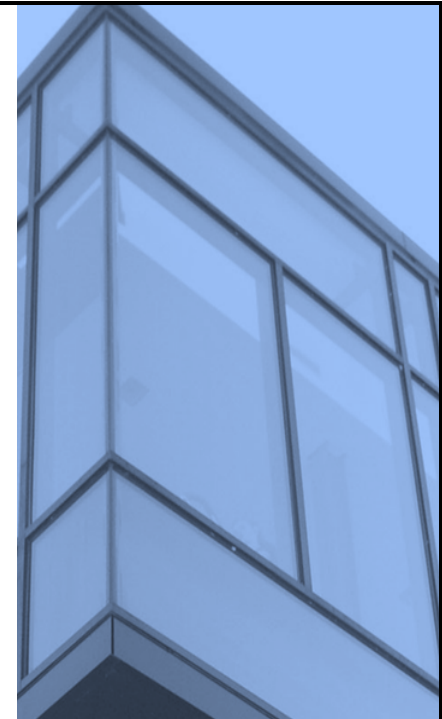


Figure 2

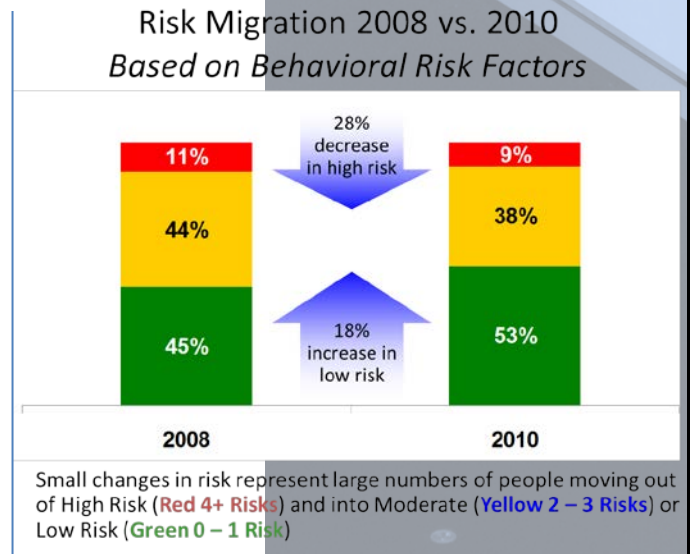
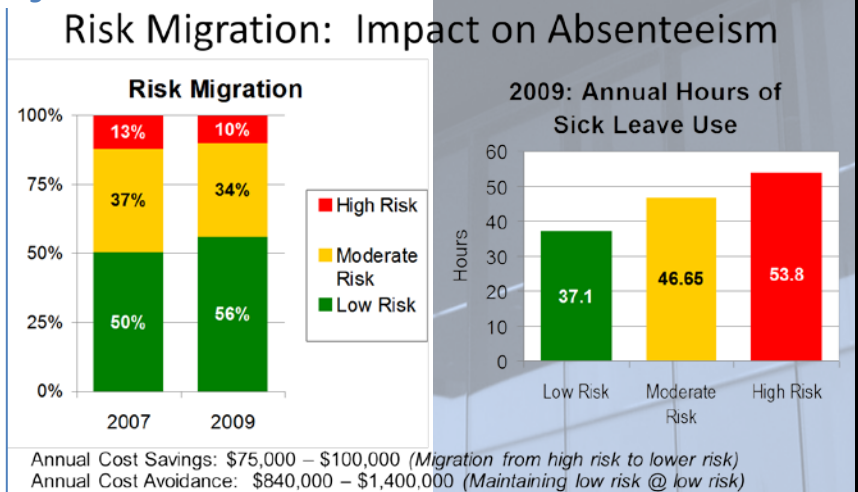


Figure 3



APPENDIX ONE: Measures of Success for 10/11

Organizational Vitality		
<u>Goal:</u> OE will promote the UI as a great place to work and will support the retention of excellent people at The University of Iowa.		
Strategy	Measure	Outcomes
Promote the Healthy Campus Initiative through programs, policy, building and environmental considerations.	Campus Recreation and Wellness Center: Integration of services and membership incentive	11 – Recreation Membership Incentive Program pilot implemented where faculty and staff in 50% or greater, regular positions receive 50% of a single membership. Utilization: 2500 faculty/staff. 10 – Wellness Services area construction complete; new programming developed 09 – Assist in development of new center, with emphasis on integration of operations in the Wellness Suite
	Implementation of healthy campus nutrition recommendations	11 – Campus Nutrition Guidelines implemented in January 2011 with launch of U Choose campaign. 10 – Recommendations developed and approved by UI leadership
	Number of lactation rooms on campus	11 – 33 Also ensured compliance with new Department of Labor regulations. 10 – 32 09 – 31
	Number of policy, environmental or building impacts we make	11 – Opening of Campus Recreation and Wellness Center, August 2, 2010. 10 – Smoking cessation benefit expanded to support University smoke-free campus policy. \$7,794 was reimbursed to 31 individuals who used nicotine Replacement Therapy to stop smoking.
liveWELL expansion: new programming	Number of participants, satisfaction, and positive Personal Health Assessment (PHA) changes for liveWELL participants	CY 2011 Behaviors <ul style="list-style-type: none"> 664 Health Coach clients successfully completed the service. Demonstrated improvements in all health behavior categories with 83% of clients meeting or partially meeting goals outlined in their Health Improvement Plan. PHA – 11,034 participants (69% of eligible participation) *total number of users up from 9986 in 2009. Faculty 50% MSE 63% P&S 71% Merit 62% House staff 50% Health Coach – 664 completed service. Estimated cost savings of \$135,000 ¹ <ul style="list-style-type: none"> 99% report services as good or excellent 95% report services improved their health 93% report improved work productivity 88% report improvement in satisfaction with working at The University of Iowa *data collected on calendar year, Jan 1 through Dec 31, 2010 ¹ Quality metric Inc. Predicated Medical Expenditure and Program Effects Analysis of SF-12v2™ Health Survey Data Summary Report. May 2007. Based on \$204/year savings per health coach client at 403 total Health Coach Clients (1/1/07/12/31/07).

Expand and evaluate UI LEAD	Number of participants in UI LEAD and outcomes of cohort model	<p>11 –65 participants (54 unique participating leaders).</p> <ul style="list-style-type: none"> Expanded depth of partnership with the Carver College of Medicine Leadership Series (UI LEAD, cohort facilitation, program planning, and 21 unique participating leaders fy 10-11). Introduced MBTI cohort teambuilding (13 unique participants over 4 departments, plus MBA class cohort (18). <p>10 – 60 UI faculty and staff leaders participated, 30% increase over last fiscal year. 09 – 46 participants are actively engaged in UI LEAD with productivity reported at close. 100% of respondents reported at least one behavior change (n= 7).</p>
Develop Talent Management strategy and design	Design performance management strategy Select software vendor	<p>11 – One performance management process to be used for all P&S non-bargained was developed and agreed upon. RVP for vendor released, top two vendors selected.</p> <p>10 – Charge developed, membership identified, and initial meetings completed.</p>
Support individual resiliency and productivity throughout the University community	Number of resiliency trainings	<p>11 – 8 resilience trainings provided by UI Wellness</p> <p>10 – 25 trainings provided to faculty and staff</p>
	Number of flexible work arrangements	<p>11 – 226 new or continuing flexible work arrangements</p> <p>10 – 130 new or continuing flexible work arrangements</p> <p>09 – 99 new or continuing flexible work arrangements</p>
Implement University child care recommendations	Number of campus connected centers Number of community grants for child care	<p>11 – 14 campus connected centers 1 new community grant for child care</p> <p>10 – 13 campus connected centers 2 new community grants for child care</p> <p>09 – 13 campus connected centers 3 community grants for child care</p>
Focus on opportunities that improve staff and faculty engagement and effectiveness, and improve organizational effectiveness	Number of recognition grants (staff appreciation) Number of Improving Our Workplace Awards	<p>11 – Staff appreciation grants 44 (3,265 staff afforded appreciation) IOWA: 12 teams and 8 individual awards (58 individual awardees, 22 nominators)</p> <p>10 – Staff appreciation grants 31 (2318 staff afforded appreciation) IOWA: 18 teams and 5 individual awards (120 individual awardees, 23 nominators, 10 extreme nominators)</p> <p>09 – Staff appreciation grants 28 IOWA: 21 teams and 10 individual awards</p>

Process Improvement		
<u>Goal:</u> OE will improve organizational performance, and drive enhanced measurement of processes and systems.		
Strategy	Measure	Outcomes
Implement 12 business process improvements (PBI) campus wide	ROI summary of key Business Process Improvement efforts: BPI, Lean or redesign	11 – 11 Lean events, 3 Five S 10 – 12 Lean events, 5 Five S 09 – 5 Lean events, 19 Five S, 1 program/unit review
Identify two opportunities for partnership with UI Health Care Human Resources	# of opportunities	11 – UIHC Training Review and UI Health Care new Employee Orientation Revamp 10 – Key Performance Indicators 10 – Retreat participation and facilitation
Offer CEU training	# and types of CEUs offered	11 – Offered 2 conferences with CEU credit available: <ul style="list-style-type: none"> • Ready or Not – Threat Assessment Options & Strategies for Schools & Businesses (58 attendance certificates sent out) • The Impact of Combat Deployments to Iraq & Afghanistan on Veterans: Assessment, Research, and Treatment (5 Nursing, 6 Iowa Board of Certification, and 5 American Psychological Association CEUs offered. 25 attendance certificates sent)
Implement broad communication/ engagement strategy for OE services	Use electronic systems to enhance communication and engagement strategy.	11 – live WELL Facebook page. 300+ "friends". 10 – Email reminder system implemented for use of Online Lifestyle Management Programs. 10% increase in participation. 10 – Self-Service reminder for Personal Health Assessment completion. Average 5-10% increase in participation.
Implement health and productivity data integration process	Development of data dashboard from health and productivity data integration	11 – Leadership dashboard framework established. 10 – Monthly operational dashboard established.
Expansion of PHA		11 - Two questions added to assess risk factors associated with sleep behavior.
Establish key indicators for HR success	KPI framework implemented	11 – Revisions to KPI framework based on facilitated discussion with Senior HR leaders. Revised framework and distributed summer 2011.

Quality of Service		
<u>Goal:</u> OE will exceed customer expectations, and enhance opportunities for improving the health, productivity and engagement of staff, students and faculty.		
Strategy	Measure	Outcomes
Promote and support national and regional recognition of OE activities	Number of awards or recognition for OE	<ul style="list-style-type: none"> Live Healthy Iowa – 2011 Outstanding Participation Award
	Number of staff certified/new certification for OE	<ul style="list-style-type: none"> Erin Litton – Certified Health, Fitness and Wellness coach Carla Melby-Oetken – Certified Wellness Coach JoAnn Miller – Certified Health and Wellness Coach Megan Moeller – Master Certified Health Education Specialist Pat Kenner – Certified Professional Facilitator (recertification) Nicole Studt – Certified Wellness Coach Joni Troester – Executive MBA Degree
Provide innovative and quality programming that demonstrates organizational impact	Learning and Development (includes classroom, e-learning, and software training) Total volume and unique participation	11 – 25,421 Instructor-led, ICON, and SkillSoft courses completed. All L&D courses, including SkillSoft and ICON: 9,727 unique individuals 10 – 26,137 Instructor-led, ICON, SkillSoft courses completed. All L&D courses including SkillSoft and ICON: 9,395 unique individuals 09 – 29,553 Instructor-led, ICON, SkillSoft courses completed. All L&D courses including SkillSoft and ICON: 12,232 unique individuals.
	Customer satisfaction data meets or exceeds expectations	11 – 77.2% agree or strongly agree knowledge/information met needs 10 – 97% agree or strongly agree knowledge/information met needs 09 – 89.55% satisfaction
	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 93.2% agree or strongly agree performance or productivity will improve after course 10 – 79% agree or strongly agree performance or productivity will improve after course 09 – 73.36% report that participation has increased their productivity.
	Consult with campus trainers to improve effectiveness and use of technology	11 – 4 consultations 4 class offerings
	Employee Assistance Program Total volume and unique participation	11 – 569 unique 1:1 counseling clients; 46 cases for supervisory referrals 10 – 544 unique 1:1 counseling clients; 96 cases for supervisory and other limited referrals 09 – 552 unique 1:1 counseling clients
	Utilization rate	11 – 3.6% 10 – 3.4% 09 – 3.5%
	Customer satisfaction data meets or exceeds expectations	11 – 94% satisfaction rate 10 – 86% satisfaction rate 09 – 90.9% satisfaction rate
	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 84% report that participation increased productivity 10 – 54% report that participation increased productivity 09 – 60% report that participation increased productivity

	<u>UI Wellness</u> Total volume and unique participation	11 – 11,461 unique participants 10 – 9,922 unique participants 09 – 10,570 unique participants
	Utilization rate	11 – 74% 10 – 62% 09 – 67.5%
	Customer satisfaction data meets or exceeds expectations	11 – 98% satisfaction rate 10 – 96% satisfaction rate 09 – 86% satisfaction rate
	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 93% report participation increased productivity 10 – 89% report participation increased productivity 09 – 86% report participation increased productivity
	<u>UI Wellness liveWELL initiative</u>	CY10 - 93% of 2010 Health Coach participants indicated that their productivity improved as a result of the service. PHA Self-Reported Work Performance and Productivity (WLQ) comparison from 2009 to 2010 Time demands – 0.6% improvement Physical Demands – 0.7% improvement Mental-interpersonal demands – 0.4% improvement Output demands – 0.5% improvement CY09: 97% of 2009 Health Coach participants indicated that their productivity improved as a result of the service. PHA Self-Reported Work Performance and Productivity (WLQ) comparison from 2008 to 2009 Time demands – 0.4% improvement Physical Demands – 0.3%improvement Mental-interpersonal demands – 0.4% improvement Output demands – 0.1% improvement
	<u>Behavior Risk Management</u> Number of cases and hours	11 – 6 BRM cases; 20 potential BRM/Fit For Duty consults; 204.75 hours of effort 10 – 5 case management consults, 11 possible BRM consults 09 – 6 BRM cases; 16 potential BRM cases; over 167 hours of effort
	<u>Threat Assessment</u> Number of cases	11 – 263 cases 10 – 238 cases 09 – 94 cases (6 months of 08-09)
	<u>Workplace Consultations</u> Total volume and unique participation	11 – 284 unique participants 10 – 614 unique participants 09 – 924 unique participants
	Utilization rate	11 – 2% utilization 10 – 4% utilization 09 – 5.9% utilization
	Customer satisfaction data meets or exceeds expectations	11 – 97% satisfaction rate 10 – 100% satisfaction rate 09 – 95.5% satisfaction rate

	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 85% report participation increased productivity 10 – 91.84% report participation increased productivity 09 – 63.6% report that participation increased productivity
	<u>Advanced Management Series</u> Total volume	11 – 27 participants 10 – 29 participants
	Customer satisfaction data meets or exceeds expectations	11 – 91% satisfaction rate 10 – 88% satisfaction rate
	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 100% of participants who responded to the follow-up evaluation indicated that the goal setting exercise and knowledge gained through the Advanced Management Series contributed to greater effectiveness. 95% of participants who responded to the follow-up evaluation indicated that their productivity at work and as a supervisor increased as a result of meeting their goals. 10 – 100% of participants and supervisors who responded to the follow-up evaluation indicated an increase in the participants’ productivity as a result of participation in the series 09 – Supervisors responding reported a 36% average increase in productivity. Return rate 36%
	<u>Family Services</u> Total volume and unique participation	11 – Student families served through childcare subsidy program: 247 Employees served through specific programs: 426 10 – Student families served through childcare subsidy program: 244 Employees served through specific programs: 530 09 – Students served: 504 Employees served: 723
	Customer satisfaction data meets or exceeds expectations	11 – 90% satisfaction rate 10 – 94% satisfaction rate 09 – 95% satisfaction rate
	Specific behavior and productivity change for individuals/orgs as a result of programming	11 – 85% report participation increased productivity 10 – 92% report participation increased productivity 09 – 95% report participation increased productivity
	Expand child care services and access	11 – New agreement with Good Shepherd Center provided 20 additional slots for infant care Agreement with Handicare provided 29 additional slots for infant care
	<u>UI Lead</u> Total volume and unique participation Satisfaction Rate Specific behavior and productivity change for individuals	11 – 65 participants in various forms of UI LEAD (54 unique participating leaders, not including participants’ supervisors and/or faculty administrators) <ul style="list-style-type: none"> • 84% in UI satisfaction rate (My satisfaction in working at The UI has increased as a result of participation.) • 58% changed at least one leadership behavior* • 74% reported a productivity increase, with an average increase of over 28%. *Many respondents said they had not been in the program long enough before the annual survey to see change. 10 – 60 participants (30 unique participating leaders and their supervisors and/or faculty administrators) 100% satisfaction rate 100% changed at least one leadership behavior

Coordination of research staff educational opportunities	Number of educational opportunities Number of participants	11 – 26 Applied Science Sessions offered, supplemented by various L&D Personal Development sessions. 66 participants in series 10 – Biomedical Series completed February 10; 83 certificates awarded 09 – SAS User Group expanded and now includes corporate sponsorship
Targeted programming related to specific population needs	Number and type of programs offered	11 – Twelve Group Health Coach programs provided 10 – Four group Health Coach programs provided 09 – Two offerings for VP for Research Animal Care Facility

Financial Stewardship

Goal: OE will generate revenue as needed, demonstrate return on investment for programs and services, and maintain funding resources or allocation for OE through partnerships and grants.

Strategy	Measure	Outcomes
Determine financial analysis of specific OE programs that support organizational sustainability	liveWELL Program (including Health Coach Service) Health risk reduction/migration Health care utilization and costs ROI	Health Risk Migration <ul style="list-style-type: none"> Improvements in the population behavioral risks of unmanaged stress, physical inactivity, unhealthy eating, and smoking were demonstrated for those individual participating in 2009 and 2010 (N=7,557). <ul style="list-style-type: none"> Unmanaged stress decreased from 19% to 18% (N=91) Lack of regular exercise decreased from 38% to 33% (N=332) Unhealthy eating decreased from 54% to 50% (N=145) Smoking stayed steady at 8% Related to a university snapshot of all PHA users from 2008 – 2010, steady health improvements documented over three-year period. From 2008-2010, Health Risk Migration resulted in a 28% decrease of individuals in the high risk population (4+ risks) and an 18% increase of individuals in the low risk population equating to significant cost savings for the University.
	Flu vaccination campaign ROI	11 – 12,078 (67%) estimated cost savings \$1,012,619 10 – 12,119 (68%) estimated cost savings \$1,016,057 09 – 12,494 (69%) estimated cost savings \$1,047,496 <i>*A worksite influenza immunization program. Impact on lost work days, health care utilization, and health care spending. Dille, JH <u>American Association of Occupational Health Nurses</u>, 1999 Jul: 47(7):301-9 Based on per vaccine savings of \$83.84.</i>
	Workplace Consultations/UI LEAD coaching ROI	11 – Case example, coaching: ROI = 1766% Case example, facilitated discussion: ROI = 2455%; benefits cited were improved personal and group productivity and improved product for customer 09 – Average ROI for consultation and coaching 2789%
	Advanced Management Series ROI	11 – Programmatic ROI = 1507% (based on productivity increases estimated by the 75% of program participants who completed an outcomes survey) 10 – 129% ROI
	Employee Assistance Programs ROI	11 – Use of EAP internal providers vs external providers \$107,575 annual cost savings 10 – Use of EAP internal providers vs external providers \$92,630 annual cost savings 09 – Use of EAP internal providers vs external providers \$56,773 annual cost savings
	e-learning ROI	11- Study on ICON classes showed a cost savings of \$475,759.75
	Business process improvement ROI	11 – ROI from Lean event will equal 72% over a 3-year period
Partner with others on or off campus that provide services; reduce duplication of effort	Examples of partnerships	11 - Service integration – Campus Recreation and Wellness Center Iowa Lean Consortium

Pursue funding through grants and scholarships	Monies for programs and services obtained through sponsorship and non-budgeted sources	11 - Live Healthy Iowa Scholarship \$500 University of Iowa Community Credit Union Health Fair \$1500 Staff Appreciation Grants \$1500 Improving Our Workplace Award \$1500
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APPENDIX TWO: PARTNERS IN SUCCESS 10/11

Internal

Behavior Risk Management Team
Family Issues Charter Committee
IT Professional Development Committee
Threat Assessment Team / ad hoc Threat Assessment Team
UI Retirees Association
UI Staff Council
Senior HR Leadership Council
HR Unit Representatives
Equal Opportunity and Diversity
Office of the Ombudsperson
Office of the President
Office of the Provost
College of Business
College of Dentistry
College of Education
College of Law
College of Liberal Arts and Sciences
College of Medicine
College of Nursing
College of Pharmacy
College of Public Health
Admissions
Continuing Education
Evaluation and Exam Service
International Programs
Museum of Art
Office of Student Financial Aid
University Libraries
Senior VP and Treasurer/Finance and Operations

Vice President for Human Resources
Administrative Services
Compensation and Classification
Employee and Labor Relations
Employment
Faculty and Staff Disability Services
Information Management
Payroll Office
University Benefits
Vice President for Medical Affairs
Center for Disabilities & Development
Chemical Dependency Services
DeGowin Blood Center
Health Care Information Systems
UI Health Care Human Resources
Nursing Continuing Education
Operational Improvement
UI Health Plans
Safety and Security
UI Behavioral Health
University Employee Health Clinic
University of Iowa Hospitals and Clinics
Vice President for Legal Affairs and General Counsel
Vice President for Research
Research Professional Development Work Team
Environmental Health & Safety Office
State Hygienic Laboratory
Vice President for Student Life
Dean's Office
University Counseling Services
Recreational Services
Student Government
Student Health Services
The Center for Student Involvement and Leadership
University Book Store

University Housing
Women's Resource & Action Center

External

Campus Connected Daycare Providers
A Two Z
Alice's Rainbow
Apple Tree
Early Learners
4Cs
Good Shepherd
HACAP Head Start
Handicare, Inc.
Home Ties
Kids Care Coop
Little Angels Learning Center
Melrose Day Care
The Mary Jo Small Childcare Center at Brookland Woods
UIHC Bright Horizons
University Preschool
CPP, Inc.
Iowa Department of Economic Development
Office of Lean Enterprise
Iowa Lean Consortium
Iowa Quality Center
Johnson County Crisis Center
Johnson County Suicide Prevention Coalition
Live Healthy Iowa
Partnership for Alcohol Safety
Rape Victim Advocacy Program
University of Iowa Community Credit Union
University of Iowa Foundation