

Fourteen reasons

to report wellness outcomes



Is taking the time to evaluate a wellness program and determine outcomes a value? Absolutely. Here's why

by Patricia Ryan, MS

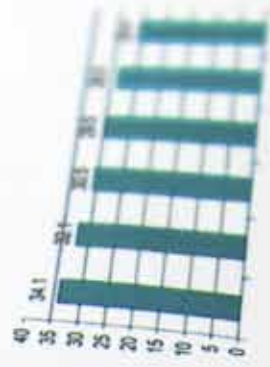
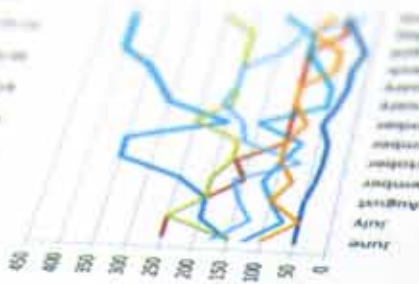
"It's not possible to measure wellness! How do you plan to do that?" That was the response of the CEO of a senior living community when the wellness director proposed to expand the wellness program around the dimensions of wellness, then support the value of the new program by tracking and benchmarking results. It's a good question.

How do you measure the outcomes of "wellness," which is a person's sense of well-being? And, is there a reason to even try?

An outcome is simply a measurement of what happened. The formula is simple:

- what the situation was before a change
- what changed (e.g., program, initiative, marketing, personnel)
- what happened after the change

Continued on page 38



Fourteen reasons to report wellness outcomes

Continued from page 36

For wellness, outcomes are often the actions that can lead to a sense of well-being, along with measures that can reduce risks to health or enhance feelings of well-being. Outcomes in wellness include those on the following list:^{1,2,3}

- increase or decrease in number of current participants
- increase or decrease in retention of individual participants
- ratings on satisfaction surveys, evaluations and program surveys
- changes in behavior, such as percent of people who report eating more vegetables following a health education series
- changes in employee health status or health behaviors (e.g., number who quit smoking)
- percent increase or decrease in assessments of strength, balance or flexibility, both for individuals and all participants as a group
- number of falls reported
- increase or decrease in number of referrals to your location from current participants

As organizations transition into a wellness culture and implement the culture through formal programs and informal opportunities, the ability to show the results of wellness programs rises in priority. The more an organization dedicates resources and investment to wellness (the traditional activities/enrichment, fitness and health education services), the more staff members and managers need systems to objectively report if that investment has been beneficial for older adults and for the organization.

It does take time to track outcomes, according to Jackie Halbin, Living Well manager at Lakeview Village in Lenexa, Kansas, but it is time well spent. “The way I look at it, we [wellness staff] can spend our time helping individuals improve their lives, or I could spend my time figuring out and guessing about the next new program, how to market and recruit clients—this all takes a lot of time,” says Halbin. She uses

Interactive Health Partner (IHP) software to track Senior Fitness Test assessments and the ICAA/ProMatura Wellness Benchmarks software to track participation and program elements (see “Resources” on page 40). “The reports from the ICAA/ProMatura benchmarks and the IHP save me time because I can see what programs need to be changed to accommodate the needs of the clients, and the sharing of their scores on the Senior Fitness Test keeps residents coming back to class.”

Staff members are not fond of sitting at the computer to enter data, agrees Jana Headrick, director of wellness at Inverness Village in Tulsa, Oklahoma, where the management program from HealthAbility™ is in place. “But we have to think of this as running a business,” Headrick stresses. “If there are no customers, the business fails. If no people come to our program, then we cannot impact people’s lives. And we have to know where people are so we can help them reach their goals.”

Reasons to invest in wellness

There are many reasons to invest in older-adult well-being. Tracking and reporting the outcomes of wellness programs illuminates the benefits and maximizes the opportunities for organizations and participants. Below are 14 reasons to report wellness outcomes:

1. Outcomes inform the older adults who have invested in your program that their trust is rewarded.

The purpose of any wellness opportunity is to support older adults in realizing the quality of life they desire. Outcomes measurements show older adults who participate, and their family members, how effective the wellness activities are for maintaining their functional abilities (for example, if participating in fitness, brain health and nutrition programs) and confirm these with facts rather than vague statements.

At Lakeview Village, the CEO shares the results of the wellness program annually with all community residents in a State of

the Village address. Halbin notes that residents are interested in how the community as a whole is doing, and the potential for the Living Well program to attract new residents. Outcomes reports are likewise shared with the whole community, as well as individuals, at Inverness Village.

2. Specific outcomes separate your program from others, which increases marketing and sales potential.

How many senior living communities, active-aging community centers and other locations say they have a wellness program? Probably a lot! When you can show program offerings as well as the progress made by your participants and their satisfaction with your community or center, older adults and their families who are seeking services have a firm idea of how your location compares with others.

When marketing highlights the objective data from the wellness program, you can draw a line to supporting occupancy (senior living) or to memberships. Wellness results become the basis for press releases and marketing for your organization.

3. Outcomes are objective ways to set goals for departments and individuals, then track performance.

Outcomes for a program are a management tool that indicates direction and inspires program improvements. Goals might be to increase participation among individuals from 30% to 35% over the next year, or to redesign or replace activities with fewer than eight participants. When staff members and managers sit down for performance reviews, outcomes give both something solid to discuss.

4. Outcomes can explain how the wellness activities helped solve a problem.

Social isolation and loneliness can have a negative impact on older adults’ health and feelings of well-being.^{4,5} Are the formal programs and informal opportunities at-

Continued on page 40

14

reasons to report wellness outcomes

- 1.** Outcomes inform the older adults who have invested in your program that their trust is rewarded.
- 2.** Specific outcomes separate your program from others, which increases marketing and sales potential.
- 3.** Outcomes are objective ways to set goals for departments and individuals, then track performance.
- 4.** Outcomes can explain how the wellness activities helped solve a problem.
- 5.** Outcomes can identify areas that need to be addressed.
- 6.** As a program management tool, measuring outcomes shows how well the program implements the dimensions of wellness.
- 7.** Outcomes shown in numbers, graphs and charts (if presented well) are quick ways to communicate to decision-makers.
- 8.** Career advancement opportunities open up for wellness professionals who add outcomes measurement to their skill set.
- 9.** Tracking outcomes improves communication with other departments, therapists and medical providers.
- 10.** Outcomes provide objective numbers that support requests to grant funders and donors.
- 11.** Partnerships form more easily when outcomes show the results.
- 12.** Effectively allocate budget dollars by using outcomes measures to plan spending.
- 13.** Wellness program outcomes mesh with the goals of human resources to improve employee health.
- 14.** Outcomes can help the program receive recognition by winning awards.

Fourteen reasons to report wellness outcomes

Continued from page 38

tractive enough to lure people out of their apartments and homes? Can you identify the number of new people who visit or try an activity? If the answer is “yes,” you can then show that the wellness program is helping to solve the big problem of isolation. If you worked with another department or agency to provide transportation for people who cannot attend on their own, forming that partnership is an outcome, too.

Other problems the wellness program can help solve are support of chronic disease management programs, such as those for diabetes or heart disease, by offering targeted healthy eating and fitness programs. Post-rehabilitation programs can build from therapy. Track these participants, record their attendances and evaluations, and combine these with the health measures to demonstrate the role of wellness.

5. Outcomes can identify areas that need to be addressed.

When current participants tell you they are happy and most activities are attended, it's easy to think that all is well. Perhaps it is. But, are there areas for improvement? For example, the most common outcome measurement used right now is the number of participants, reported 90% of respondents to the ICAA Wellness Industry Development Survey 2012.² But does counting the number of people in an activity (20 people at the cheese tasting and six in the chair fitness class) give you adequate information?

Jackie Halbin at Lakeview Village had used “head counts” of participation in classes and felt the program was well-used. However, after tracking the attendance of individuals in the benchmarks, it became clear that a few people were very active, but that

the program needed to reach many more residents. Because of this information, an outreach plan was developed to enroll more residents.

At Still Hopes Episcopal Retirement Community in West Columbia, South Carolina, Director of Wellness Denise Heimlich uses reports from the ICAA/ProMatura Wellness Benchmarks to advise residents that lack of attendance or choice of fitness classes may explain a decline in results on the Senior Fitness Test. “Individuals can get a report of their progress or lack thereof,” explains Heimlich, “which is motivational. Residents say, ‘I’m glad you do this.’ The reports also identify the strengths and weaknesses of the fitness programming.”

For example, by analyzing the results of the fitness assessments of all participants in the fitness program, Heimlich learned that

Resources

Internet

Collage: The Art and Science of Aging Well

www.collageaging.org/Site/Home/Home.aspx

EnerG by Aegis

ICAA Preferred Business Partner
www.aegistherapies.com/energ

HealthAbility

<http://healthabilitywellness.com>

ICAA/ProMatura Wellness Benchmarks

ICAA Preferred Business Partner
www.icaa.cc/business/benchmarks.htm

Interactive Health Partner (IHP)

ICAA Preferred Business Partner
www.interactivehealthpartner.com

Masterpiece Living

www.mymasterpieceliving.com

Multimedia

“Charting the Career Path for Wellness Professionals” webinar with “ICAA Career Path for Wellness Professionals” white paper

International Council on Active Aging
www.icaa.cc/careercenter.htm

“Proving your value: How you, your company and older adults benefit when you share program outcomes”

ICAA Virtual Summit recording

* Available in the ICAA Member Zone at www.icaa.cc

Print

“Local Leaders in Aging and Community Living”

National Association of Area Agencies on Aging (n4a)
www.n4a.org/pdf/localleadersaaa.pdf

“Outcomes tell your wellness story”
Journal on Active Aging, 12(2), 60–66; March/April 2013

* Available to International Council on Active Aging members in the online content library (go to: “Management articles” [“Management”]) at www.icaa.cc

“Senior Fitness Test” (Fullerton Functional Assessment)
Human Kinetics
www.humankinetics.com/home

leg strength measures were not improving (an indicator of risk for falls). Heimlich huddled with instructors; they changed class structures to increase intensity levels, and saw the leg strength measures begin to improve. Without conducting the assessments and tracking and charting results over time, Still Hopes was unlikely to bring this issue to light.

6. As a program management tool, measuring outcomes shows how well the program implements the dimensions of wellness.

The dimensions of wellness are the framework for a balanced wellness program that combines meaningful activities with those that support functional ability and leisure-time entertainment. By mapping the complete program elements within the dimensions of wellness, you can determine if areas of physical, spiritual, social, intellectual, emotional, vocational and environmental wellness are being served, and if they are meeting each area's goals.

7. Outcomes shown in numbers, graphs and charts (if presented well) are quick ways to communicate to decision-makers.

Outcomes reports are the paper version of your 30-second "elevator speech" that succinctly explains the value of the program. According to the ICAA Wellness Readiness Survey,⁶ 79% of 605 respondents said that a senior manager is responsible for promoting a wellness/active-aging culture and overseeing programs and staff. The numbers that communicate outcomes are a way to quickly and effectively relay the state of the wellness initiative to the board of directors and executives.

Each month Jana Headrick provides a dashboard report, displayed in graphs and charts, for the executive director and the corporate office at Inverness Village. "We share the information and then create an action plan," says Headrick. "We are the experts, and after sharing the information and asking for feedback, we will take the action to make adjustments."

Still Hopes' Denise Heimlich shares dashboard reports with her immediate supervisor as well as the executive staff and the secretary of the board of directors. When a change or decline appears in residents, questions may come from the chief financial officer or the director of health services. As a member of the resident review team, Heimlich will present results of the Senior Fitness Test to show that an individual has declined or improved in functional ability. These results also are given to residents with the recommendation to share them with a physician. This has resulted in early detection of a health issue.

When budget season rolls around, the objective data places "wellness" near the top of the list. For example, during the economic downturn in recent years, Jackie Halbin felt the department's budget was at risk of being cut. But, because the reports showed how the program benefitted residents, the budget was maintained. Halbin adds, "We have to be accountable for what we are doing. As long as we show outcomes, the CEO and leadership believe in it."

8. Career advancement opportunities open up for wellness professionals who add outcomes measurement to their skill sets.

As outlined in the "ICAA Career Path for Wellness Professionals," being able to measure results and set performance goals is likely to be a requirement for people in middle management and executive management roles.⁷ The abilities to look objectively at the wellness program and develop strategies to meet the goals of organizations and individuals identify a person who is positioned for additional responsibility.

9. Tracking outcomes improves communication with other departments, therapists and medical providers.

The fact that you measure and report outcomes can increase your credibility with your peers within the organization, and raise the level of wellness as more than entertainment. Physical therapists and

physicians are more willing to refer to fitness programs where participants are appropriately monitored and their progress (improvements or declines) is tracked.

"For our program I am finding a more frequent request for outcomes from our customers," says Brian Boekhout, PT, vice president, wellness services, for Aegis Therapies' EnerG[®] by Aegis, which provides wellness programs. "Customers really see the value of outcomes and want to know that we can measure these. In my opinion, you have to know what works, and what works in certain settings, and that's what outcomes tell you." To track outcomes, Boekhout uses a combination of validated assessments related to known risk factors, the Senior Fitness Test and the ICAA/ProMatura Wellness Benchmarks.

10. Outcomes provide objective numbers that support requests to grant funders and donors.

Nonprofit organizations can apply for grants to support cultural activities, fitness equipment and health education programs. When reviewing applications, grantors look for relevance to the foundation's mission or cause, as well as specific details of how the money will be used and the impact evaluated. Your past outcomes and future projections of results give grantors and agencies the confidence your plan will work. (For a good example of how outcomes are presented to show the value of Area Agencies on Aging in the United States, download the free brochure "Local Leaders in Aging and Community Living" from the National Association of Area Agencies on Aging website; see "Resources" on page 40.)

11. Partnerships form more easily when outcomes show the results.

Do you wish to solicit donations of water, snacks and giveaways for Active Aging Week[®], the ICAA-led annual health promotion event? How about inviting local

Continued on page 42

Fourteen reasons to report wellness outcomes

Continued from page 41

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businesses to join in a health fair or other special event, which involves setting up a table or booth and offering complimentary literature and advice? Your ability to show the number of participants, as well as their evaluation of the event and potential of using an exhibitor's services in the future, will help potential partners decide to join in or donate to your events. Even if its mission is support of older adults, an organization still needs to prove to stakeholders that its presence or donations are put to good use.

12. Effectively allocate budget dollars by using outcomes measures to plan spending.

In any given year, a finite amount of money is budgeted for the departments or services within the dimensions of wellness. Where should this money be spent? Evaluating the outcomes of past changes and program elements, and considering what the team (and older adults) wants to accomplish in the next year, provides a guide that makes spending choices informed rather than random. In addition, a track record of measuring outcomes encourages other depart-

ments to share their budget dollars because they have more confidence of success.

13. Wellness program outcomes mesh with the goals of human resources to improve employee health.

In recent years, wellness directors in senior living communities have been tasked with providing employee wellness programs along with the programs for residents. In ICAA's Development Survey,² 64% of respondents offered an employee wellness program (with 73% of those respondents in a continuing care retirement community). Outcomes of participation, improvements in health choices, or reductions in absences support organizational goals to control healthcare costs and turnover.

14. Outcomes can help the program receive recognition by winning awards.

Recognition is personally rewarding. At the same time, public recognition because of an award or citation or proclamation also helps to market the program and its value to older adults. A program that seems exciting and meaningful is delivered, but what happens next? That's where evaluation and outcomes come into play. For example, there are interesting programs submitted for the ICAA Innovators Awards each year. The awards review team has noted that many submissions describe a program or activity, but do not report outcomes and so are passed over.

Showing the value of wellness

In their training, people seeking an MBA (master of business administration) are taught that you cannot manage (or improve) what you don't measure, a tenet that has created millions of miles of spreadsheets and numbers on dashboard reports. Numbers are an important part of the picture, and a useful tool to analyze real (versus desired) results and swiftly assess progress. But numbers alone are not the whole picture.

When outcomes are combined with personal stories, photos and survey results, a powerful story emerges of the value of well-

ness—the well-being of each individual and the success of the organization in meeting the mission. Supplement personal experiences with objective data, and you have a strong package to gain priority, resources and funding for your program.☺

Patricia Ryan, MS, is author of the ICAA white paper "The Business Case for Wellness in Retirement Communities," and program manager for the ICAA/ProMatura Wellness Benchmarks. Ryan has authored articles and delivered presentations on measuring the effectiveness of wellness programs for older adults.

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7. International Council on Active Aging. (2014). ICAA Career Path for Wellness Professionals. Available September 25, 2014, at <http://www.icaa.cc/careercenter.htm>.