

# SFHSS Strategic Plan 2023-2025 Business Initiative Report

Business Initiatives List	Year	Status & Commentary
<b>Strategic Goal: Equity</b>		
<b>Business Initiative 1. Apply health equity lens to our customer service approach</b>		
<p><i>Activity 1A.</i> Support organization-wide knowledge and understanding of SFHSS' role in advocating for racial and health equity on behalf of our membership, including staff, as measured through survey response.</p>	Q1 2024	<p><b>Status:</b> On track <b>Commentary:</b> Inaugural 2020 survey themes included staff familiarity with racial equity, personal culture and sharing preferences, awareness of racial equity statements, experiences with interpersonal and institutional racism, and approaching and ending racial inequities. Pulse survey themes will be included in a broader 2024 All Staff Engagement Survey to include reflections on progress and impact of racial equity work on organizational culture as well as considerations for future education topics.</p>
<p><i>Activity 1B.</i> Recruit staff representatives from multiple SFHSS divisions to form internal Equity Working Group.</p>	Q1 2024	<p><b>Status:</b> Strategy Revised <b>Commentary:</b> Prior to 2024, the expectation was that each City and County department recruit divisional staff representatives to form internal Equity Working Groups. The Office of Racial Equity has decided to kick off collective racial equity working groups citywide with a fresh and more effective collaborative approach. These Peer Learning Cohorts (PLCs) will be organized into four pipelines based on departmental racial equity priorities: <b>Pipelines Cohort</b> - Sharing and reflecting on practices departments have tried around equitable entry points into their departments (e.g. recruitment, internships, interviews, job descriptions, etc.). <b>Pathways Cohort</b> - Sharing and reflecting on practices departments have tried around equitable professional development, mentorship, pathways for employee mobility, etc. <b>Culture Cohort</b> - Sharing and reflecting on practices departments have tried around creating belonging and safety, such as supporting affinity spaces, engaging staff, receiving employee feedback, etc. <b>Justice Cohort</b> - Sharing and reflecting on practices around belonging and understanding, specifically for law enforcement and justice departments</p>
<b>Business Initiative 2. Apply equity lens to our workforce environment</b>		
<p><i>Activity 2A.</i> Use mixed training methods to expand collective knowledge about diversity, racial equity, and equity-related concepts.</p>	Q4 2023	<p><b>Status:</b> On Track <b>Commentary:</b> The Office of Racial Equity has approved SFHSS' request to participate in a suite of equity trainings sponsored through a contract with Be the Change™ Consulting. This contract includes a series of 2.5 hour virtual, experiential sessions accompanied by tools and resources to support implementation. These trainings are intended to give both supervisory and non-supervisory leaders the opportunity to to deepen their knowledge and tools and implement equity practices through organizational culture, supervision, performance reviews and meeting facilitation. 11 representatives from 6 SFHSS divisions will attend 10 hours of training total to carry out equity commitments in alignment with our Strategic Plan. Training topics include <i>Developing a Culture of Belonging</i> , <i>Becoming a Liberatory Organization</i> , <i>The Fundamentals of Equitable Employee Development</i> , <i>An Equitable Approach to Retention and Advancement</i> , <i>Facilitation as a Practice for Equity</i> , <i>Inclusion and Power Sharing</i> , and <i>Designing &amp; Implementing Equitable Performance Reviews</i> .</p>
<p><i>Activity 2B.</i> Conduct bi-annual workforce demographic analysis using the Department of Human Resources Workforce Dashboard.</p>	Q2 2024	<p><b>Status:</b> Completed The Office of Racial Equity partnered with the Department of Human Resources to provide each City and County department with required data for the bi-annual workforce demographic analysis. This included the analysis and publication of disaggregated workforce diversity data for overall departments and senior management and a trend analysis of terminations, promotion, new hires and average hourly pay for all employees via the City's Applicant Tracking System (ATS).</p>
<b>Strategic Goal: Primary Care</b>		
<b>Business Initiative 3. Improve primary care and well-being services</b>		
<p><i>Activity 3A.</i> Improve primary care effectiveness by setting baseline standard metrics and improvement targets.</p>	Q2 2024	<p><b>Status:</b> On Track <b>Commentary:</b> SFHSS participates in the Purchaser Business Group on Health (PBGH) National Primary Care Payment Reform working group. This working group builds consensus for new payment models and baseline measurement standards that support and enable advanced primary care. In alignment with working group recommendations, SFHSS health plan partners were asked to submit a subset of the National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS) measures. PBGH has set the performance certification standards at the 66th percentile. In addition to the PBGH certification standards, SFHSS continues to use the metrics selected by PBGH in it's Performance Guarantees (PGs). The PG targets are set at baseline plus a glidepath for improvement based on annual negotiations with Health Plans.</p>

<p><i>Activity 3B.</i> Adapt methodology, standards, reporting requirements and goals for primary care spend and total cost of care.</p>	<p>Q2 2024</p>	<p><b>Status:</b> On Track <b>Commentary:</b> Advanced primary care has been demonstrated to improve outcomes and patient experience while reducing total cost of care. This is a primary strategy of SFHSS that aligns with the Purchaser Business Group on Health (PBGH). PBGH has developed a national Advanced Primary Care (APC) system of excellence to meet the needs of employees and families in partnership with Integrated Healthcare Association (IHA) and the California Quality Collaborative (CQC). The program is dedicated to advancing the quality and efficiency of the health care delivery system across all payers, and its multiple initiatives bring together providers, health plans, state, and purchasers to align goals and take action to improve the value of health care for Californians. In the San Francisco Bay Area deployment of this system of excellence is being tested through an exclusive pilot with Blue Shield of California. As a participating purchaser, SFHSS has committed to testing enhanced payment and prospective payment models to remove barriers to optimal care in partnership with Blue Shield. The pilot launched in January of 2024 with early results being made available to participating purchasers in June.</p>
<p><i>Activity 3C.</i> Improve population health outcomes in the measurement plan through alignment with other purchasers and healthcare providers.</p>	<p>2023-2025</p>	<p><b>Status:</b> On Track <b>Commentary:</b> SFHSS is well-positioned and ahead of the curve, both statewide and nationally, regarding reporting, benchmarking, and advocating for improvements in health measures for SFHSS subpopulations. This has been achieved through alignment with leading healthcare authorities like the Department of Managed Healthcare (DMHC), Integrated Health Care Association (IHA), Catalyst for Payment Reform, Covered CA, and CalPERS. SFHSS has served as a member of the DMHC Health Equity and Quality Committee and the IHA Board of Directors to align key performance measures with other state and national benchmarking authorities. Health plans are required to begin collecting data for 13 HEDIS measures stratified by race and ethnicity in 2023 and these 13 measures are already embedded within the SFHSS Measurement Plan. SFHSS' initial focus is on the reduction of equity gaps/disparities in maternal health, diabetes care and high blood pressure.</p>
<p><b>Business Initiative 4. Advance Equity in the Delivery of Primary Care Services</b></p>		
<p><i>Activity 4A.</i> Require stratification of nationally recognized equity measures to improve quality of care for underserved populations.</p>	<p>Q4 2025</p>	<p><b>Status:</b> On Track <b>Commentary:</b> SFHSS is actively developing a baseline and strengthening data partnerships through health plan report auditing. This will formalize processes for identifying and addressing health disparities that disproportionately affect communities of color. Health plans have collaborated with the Contracts team in keeping SFHSS apprised of their growing reporting capabilities for subpopulations. SFHSS Performance Guarantees have been a valuable tool in codifying shared health equity priorities in support of underserved populations.</p>
<p><b>Strategic Goal: Affordable and Sustainable</b></p>		
<p><b>Business Initiative 5. Monitor Funding Sustainability</b></p>		
<p><i>Activity 5A.</i> Forecast Health Sustainability Fund Revenues ability to fund necessary expenditure.</p>	<p>Q2 2024</p>	<p><b>Status:</b> On Track <b>Commentary:</b> As the General Fund faces pressure due to growing City budget deficits, the Health Sustainability fund has geared more toward supporting SFHSS strategic initiatives. In the FYE 2025 budget we will evaluate the charge for this fund used in the rate setting process and develop a 5 year plan showing the projected sources and uses of this fund.</p>
<p><i>Activity 5B.</i> Manage change in healthcare spend as compared to national and local trends.</p>	<p>Q3 each year</p>	<p><b>Status:</b> On Track <b>Commentary:</b> While healthcare prices have high variability and historically outpace inflation, SFHSS' average rate increase is lower than local and national trends for the past five years. The rates for plan year 2024 are high due to the lagging impact of inflation on healthcare costs and lower than expected CMS funding for Medicare Advantage (MA) plans. In response to this cost increase, we are conducting an RFP for the MA plan for Plan Year 2025 and will evaluate a need for commercial plan RFP for Plan Year 2026.</p>
<p><i>Activity 5C.</i> Use Health Plan Price Transparency data to influence SFHSS cost of care in comparison to national and local trends.</p>	<p>Q3 each year</p>	<p><b>Status:</b> Deferred <b>Commentary:</b> SFHSS tracks transparency legislation that makes healthcare pricing data more accessible for cost comparison to further advance value for our members. The utility of such price transparency data has proved challenging and best alternatives are being evaluated. In the meantime, SFHSS is tuning into the California Office of Health Care Affordability's (OHCA) Health Care Affordability Board that regulates processes to capitate rates on total healthcare expenditures from payers. OHCA is responsible for setting overall statewide cost growth targets, and specific targets for different sectors of the healthcare industry. The Health Care Affordability Board will establish the overall healthcare cost growth target for per capita spending and set specific targets by healthcare sector, including fully-integrated delivery systems, geographic regions, and individual healthcare entities. At the federal level, effective December 27, 2020, the Consolidated Appropriations Act, 2021 (CAA, 2021) prohibits group health plans from entering into contracts containing "gag clauses". SFHSS has submitted to CMS our first annual attestation of compliance with the gag clause prohibition on behalf of our group health plans.</p>

Business Initiative 6. Maintain Board Education		
<p>Activity 6A. Support Health Service Board knowledge and understanding of their role in assuring affordable health benefits are offered to SFHSS members through securing fiduciary, actuarial, legal, and administrative consultative services, and expertise. This should align with the Board three-year Education Plan, including the use of other resources as needed.</p>	<p>Q4 each year</p>	<p><b>Status:</b> On Track  <b>Commentary:</b> Ensuring long range financial stability for the Trust is an active and ongoing commitment of the Health Service Board stewardship responsibility. Diverse educational opportunities are provided so that Commissioners can access subject matter expertise on fiduciary, actuarial, legal, and administrative matters that are pertinent to the role of the Board in Benefits’ policy and governance. Past and future educational opportunities are outlined below with corresponding subject matter experts named:  8/2023 - Healthcare Ecosystem and Market Overview: Iftikhar Hussain, SFHSS Chief Financial Officer and Mike Clarke, Lead Actuary, Aon  9/2023 - Market/Health System Innovation Anne Thompson, Senior Account Executive, Aon  11/2023 - Benefit Design Benchmarking and Plan Design Influence on Member Plan use Behavior: Anne Thompson, Senior Account Executive, and Mike Clarke, Lead Actuary, Aon  11/2023 – Determining City Contribution – SFHSS Retiree Medical Plans: Mike Clarke, Lead Actuary, Aon  12/2023 - Future State Opportunities for SFHSS: Anne Thompson, Senior Account Executive, and Mike Clarke, Lead Actuary, Aon  1/2024 – Fiduciary Training- Chris Sears, Ice Miller Legal Counsel  2/2024- Leadership Insights from SFHSS Employers: City employers include City College of SF, San Francisco Unified School District, Superior Courts of SF, City and County of SF, Municipal Executives Association (MEA)   <b>New Additions for Consideration</b>  - Incorporate Healthcare 101 into the Board Orientation materials.  - Develop a Mentorship Program between newer and more experienced board/commission members.  - Land Acknowledgement implementation based off REAP Framework.</p>

**Strategic Goal: Mental Health and Well-Being**

**Business Initiative 7. Provide easily accessible pathways to mental health and substance use disorder services through increased member awareness**

<p>Activity 7A. Conduct a mental health vendor summit to support alignment around clear pathways to navigating mental health and emotional well-being resources and services.</p>	<p>Q1 2023</p>	<p><b>Status:</b> Completed  Commentary: SFHSS held an inaugural Mental Health Forum in December 2022 to discuss how to support alignment around clear pathways to navigating mental health and well-being resources and services. The forum brought together stakeholders to understand the current state of mental health and well-being support for members and to collaborate on mapping the journey to care. SFHSS, in collaboration with the Department of Human Resources (DHR), internal department heads, health plans, and vendor partners, will develop timelines and prioritize each recommendation in conjunction with the forum. In the meantime, SFHSS has released the <i>2022 Mental Health Forum Report</i> embedded in the Director Report for Jan 2024. While these forum results and recommendations will not fix gaps in the mental health care delivery system, they will serve as a catalyst to continue building out efforts identified in the strategic plan.</p>
<p>Activity 7B. Recruit members among city departments to form an Employee Assistance Program (EAP) advisory group.</p>	<p>Q1 2025</p>	<p><b>Status:</b> Deferred  Commentary: Forming an Employee Assistance Program advisory group has proven challenging with respect to staff time and bandwidth so best alternatives are being evaluated including re-orienting energy to staff recruitment. The Well-Being division is in the process of hiring a 2595 Senior EAP Counselor to assist the current Sr. EAP Counselor in co-leading the advisory group. The 2595 Senior EAP Counselor provides direction and supervision to counselors through organizational wellness services and engagement in direct client counseling. This position also provides clinical assessments, short-term counseling, and referral of City and County employees experiencing difficulties related to personal or work-related problems. With the addition of this critical staff position within EAP, Well-Being will work to reframe goals and objectives of the EAP advisory group to help determine key stakeholders involvement.</p>
<p>Activity 7C. Create mental health campaign to increase utilization of mental health and substance use disorder resources and services.</p>	<p>Q3 each year</p>	<p><b>Status:</b> Completed  <b>Commentary:</b> Well-Being executed a Mental Health campaign in May 2023 aimed at targeting Mental Health Stigma, the Connection Between Mental Health &amp; Physical Health, and Taking Action to Reach Out and Help Others. Stats on participation and % change month to month for Trainings/Workshops, Webinars, Credible Mind Assessments, Credible Mind Sessions, and EAP Cases in relation to campaign rollout are highlighted in accompanying Strategic Plan Annual Progress slide deck.</p>

Business Initiative 8. Enhance programs to support early retiree and retiree well-being		
<p><i>Activity 8A.</i> Identify evidence-based and best practice approaches to enhancing retiree well-being.</p>	Q3 2024	<p><b>Status:</b> Deferred  <b>Commentary:</b> In follow up to the RFI for a Healthy Aging Program, the Well-Being team project lead identified a panel of retirees and SFHSS employees to engage in vendor presentations and review program submissions from the RFI. In partnership with the SFHSS Contracts division, a timeline, meeting agenda, panel survey and focus group questions were collaboratively created as outlined below:  - Panel Introductory Call - 11/30/2023  - Pre-Survey Responses Due - 12/1/2023  - Virtual Demonstrations with three vendors - 12/4, 12/5 and 12/6/2023  - Focus Group Discussions - 12/6 and 12/11  Contracts has compiled a summary of group themes, retiree survey responses and a crosswalk of the vendor submissions. This is currently under review by the Well-Being division project lead to identify next steps. SFHSS has notified the Health Service Board about the ongoing black out period throughout the completion of the RFI process.</p>
Strategic Goal: Optimize Service		
Business Initiative 9. Enhance member education and support services		
<p><i>Activity 9A.</i> Increase the percentage of members who agree to the electronic delivery of all Employee Benefit Notices by 5% year-over-year.</p>	N/A	<p><b>Status:</b> Discontinued  <b>Commentary:</b> At the onset of the Strategic Plan, SFHSS was considering the development of a member portal for personalized benefits information and well-being engagement through which electronic benefit notices could be delivered. SFHSS sought legal counsel about the feasibility of electronic delivery of benefit notices and discovered that the implementation will prove to be challenging and costly. The administrative bandwidth needed to meticulously monitor bounce backs and do additional U.S. postal mailings for those that do not verify receipt of electronic delivery, did not make this activity viable. The strategy for Open Enrollment Plan Year 2024, shifted to active employees not receiving benefit booklets in the mail this year, reducing paper waste and print costs. Instead Operations has provided multiple avenues for members to get support including distributing six (6) weekly open enrollment emails to (45,118) active employees and retirees and creating custom Open Enrollment webpages for each employer group that received a combined total of 55,718 views. During Open Enrollment Operations also supported 291 Virtual Consultations and a total call volume of 6,571 in partnership with our third party call center Valerie Schlitt and Associates. Overall only 901 members submitted Open Enrollment Plan Year 2024 benefit enrollment via paper while 12,196 submitted using Self Service eBenefits, supporting SFHSS' shift to digital strategy.</p>
<p><i>Activity 9B.</i> Improve Member Satisfaction by 2% year-over-year for the services provided by SFHSS Member Services, as measured by satisfied or higher through survey response.</p>	Q1 2024	<p><b>Status:</b> Work in progress  <b>Commentary:</b> In 2019 1K SFHSS members rated their Open Enrollment and Self-Service eBenefits experience using a premier survey aimed at gauging customer effort and satisfaction. SFHSS is now seeking to collect additional survey data that builds upon and evaluates customer service experience levels for year-round Member Services interactions. A committee has been convened to solicit interdivisional input and Operations will devise a formal Evaluation Plan for SFHSS overall.</p>
<p><i>Activity 9C.</i> Improve the First Call Resolution rate by 2% year-over-year for calls placed to SFHSS Member Services.</p>	Annually	<p><b>Status:</b> Work in progress  <b>Commentary:</b> SFHSS Communication strategy includes proactively addressing member needs based on real-time call data. The SFHSS Voice Over Internet Protocol (VOIP) system provides a robust telecommunications environment for call management, recording, routing, accessibility and future integration with the Salesforce customer relations management (CRM) system. These systems are being evaluated for the best method to track meaningful movement on First-Call Resolution rate.</p>
<p><i>Activity 9D.</i> Develop member portal for personalized benefits information and well-being engagement.</p>	N/A	<p><b>Status:</b> Deferred  <b>Commentary:</b> At the onset of the Strategic Plan, SFHSS was considering the development of a member portal for personalized benefits information and well-being engagement through which electronic benefit notices could be delivered. SFHSS sought legal counsel about the feasibility of electronic delivery of benefit notices and discovered that the implementation will prove to be challenging and costly. The administrative bandwidth needed to meticulously monitor bounce backs and do additional U.S. postal mailings for those that do not verify receipt of electronic delivery, did not make this member portal activity viable so best alternatives are being evaluated.</p>

<b>Business Initiative 10. Improve staff training and professional development</b>		
<p><i>Activity 10A.</i> Review, analyze and document the standard operating processes (SOP) in the Member Services Division.</p>	Q4 2023	<p><b>Status:</b> Complete (for the identification of the steps involved the SOP).  <b>Commentary:</b> SFHSS has hired a TPV 1813 Sr. Benefits Analyst to serve as the lead reviewer of current business practices and documentation of Standard Operating Procedures (SOP). Priority business processes have been identified for documentation and a project plan has been developed for the tracking of the SOP documentation and related activities. The Retiree Application SOP has been completed as an initial pilot and steps will be repeated for each of the identified processes below.  <b>Upcoming SOP Priorities include:</b> New Hire Processing, Hetch Hetchy Stipend Processing, Qualifying Life Events and Benefits Administration Services, Court Order Processing, Delinquency Process and Member Notice Review, Adult Dependent Child Processing, and Dependent Eligibility Audit Pilot for Active Employees. Additional SOPs will be added as they become identified, and priorities may shift.</p>
<p><i>Activity 10B.</i> Each Call Center staff provides input (through case narratives) that leads to Salesforce Knowledge Base Articles being updated twice per year.</p>	N/A	<p><b>Status:</b> Absorbed by Activity 10A  <b>Commentary:</b> This activity has been removed as a standalone initiative, as the anticipated actions are encompassed within Activity 10A. Staff identification of needed improvements or documentation of business processes will be part of the SOP assessment and gap analysis under Activity 10A.</p>
<p><i>Activity 10C.</i> Call Center staff are provided with two internal process improvement opportunities that involve cross-functional team participation and that promote career development.</p>	N/A	<p><b>Status:</b> Absorbed by Activity 10A  <b>Commentary:</b> This activity has been removed as a standalone initiative, as the anticipated actions are encompassed within Activity 10A. Lean process improvements will be reviewed as part of the SOP documentation process and gap review. The Lean process will also be incorporated into the continuous improvement steps under Activity 10A.</p>
<p><i>Activity 10D.</i> Develop standardized training for SFHSS Operations staff focusing on general customer service skills and program specific education.</p>	N/A	<p><b>Status:</b> Absorbed by Activity 10A  <b>Commentary:</b> This activity has been removed as a standalone initiative, as the anticipated actions are encompassed within Activity 10A. Staff training is now an element of each SOP that is documented. Refresher trainings will be calendared annually once the initial SOP training is complete.</p>
<p><i>Activity 10E.</i> Increase percentage of staff that report readiness and job satisfaction: having access to the knowledge, training resources, tools, and support that they need to complete Open Enrollment related tasks successfully, as measured by agree or strongly agree through survey response.</p>	Q4 2023	<p><b>Status:</b> On Track  <b>Commentary:</b> The SFHSS Leadership team has created a short 5-minute survey to better understand each individual staff member's experience with the SFHSS membership, the Open Enrollment process, and how Managers and Supervisors can better support staff for future Open Enrollments. Analysis of the anonymous responses is currently underway to better allocate resources and improve the experience for our members and our staff for the future.</p>
<b>Business Initiative 11. Implement quality improvement review processes</b>		
<p><i>Activity 11A.</i> Develop formal Quality Improvement Standards for Member Services functions.</p>	Q4 2024	<p><b>Status:</b> Deferred  <b>Commentary:</b> SFHSS is focused on aligning customer service strategies with touchpoints that are critical to the customer experience. Critical components include performance-based measurement approaches to eliminate inefficient systems and automate processes as much as possible. The timeline of developing Quality Improvement Standards will begin once baseline Standard Operating Procedures (SOP) are developed in association with lessons learned.</p>
<p><i>Activity 11B.</i> Conduct formal Quality Improvement Reviews of Member Services functions.</p>	Q1 2025	<p><b>Status:</b> Deferred  <b>Commentary:</b> SFHSS is working to ensure that customer service technologies, customer service skills, and program specific education can empower our call center staff to deliver consistent support for members at every stage of their benefits journey. The timeline for Quality Improvement Reviews of these skill sets will begin once baseline Standard Operating Procedures (SOP) are developed.</p>