

San Francisco Health Service System

Strategic Plan 2023-2025 DRAFT

September 8, 2022

Agenda

- *Timeline and Deliverables*
- *Environmental Scan*
- *Mission, Vision, Values*
- *Strategic Goals, Objectives, and Key Results*
- *Lessons Learned*

Presentation Aim

- *Provide high level overview of SFHSS strategic planning processes*
- *Seek ongoing collaborative input and endorsement of the 2023-2025 SFHSS Strategic Plan draft*

Strategic Planning: Timing and Deliverables Progress to Date

Project Steps	Timing	Process	Outcomes
Step 1: Staff Engagement Welcome & Kick-Off to Strategic Planning	March 22 nd	<ul style="list-style-type: none"> Met internally to introduce expanded Leadership Team and to relay expectations around Strategic Plan refresh activities. 	<ul style="list-style-type: none"> Assigned pre-work Spectrum Dot Exercise to gather input around the current and future state of our benefits approach structure
	March 30 th	<ul style="list-style-type: none"> Met internally to discuss how results and trends from the pre-work Spectrum Dot Exercise influence our benefit philosophy. Discuss the internal/external influences affecting priorities areas tied to our everyday work and membership experience. 	<ul style="list-style-type: none"> Gathering input to refine the Mission, Vision, Values statements. Identifying strengths, weaknesses, opportunities, and threats (SWOT) to strategic planning success.
Step 2: Health Service Board Special Meeting	April 14 th	<ul style="list-style-type: none"> Introduced the Current State Assessment Toolkit including the types of data we need to review to inform next iteration of our Strategic Plan: <ul style="list-style-type: none"> - Annual Report - Express Dashboard - DxCG Risk Score Report - Enrollee Demographic Report - SFHSS Project Portfolio 	<ul style="list-style-type: none"> Better understand the gaps between the current and future state of our offerings in relation to best practice within the field.
	April 28 th	<ul style="list-style-type: none"> Host Special Board Meeting about Future State with stakeholders including Health Service Board, various CCSF departments, vendor partners, Aon experts and members of the public. 	<ul style="list-style-type: none"> Bring together a broad set of thinkers and perspectives to help shape future programs and services to best meet the needs of the diverse populations we serve. Elevating core areas of focus including Population Mental Health, Primary Care, Health Equity, and Well-Being at Work Conversation Identify important changes in our circumstances and knowledge that SFHSS can use to refresh our strategy and keep it relevant.

Strategic Planning: Timing and Deliverables Next Steps

Project Steps	Timing	Process	Outcomes
Step 3: Health Service Board Education – Strategic Planning & Beyond	June - Sept	<ul style="list-style-type: none"> • Provide diverse educational opportunities that support the Commissioners in acquiring the knowledge they need to effectively carry out their duties and align with the Strategic Plan for 2023-2025. 	<ul style="list-style-type: none"> • Coordinate presentations at the Health Service Board <ul style="list-style-type: none"> - Retiree Health Care (June) - Pharmacy High-Cost drugs and Genomics (August)
Step 4: Staff Engagement Cont.	July	<ul style="list-style-type: none"> • Review of Environmental Scan: analysis of internal/external factors affecting strategy • Discuss summary of inputs around the Mission, Vision, Values and the Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis • Breakout Group Discussion with Managers and Expanded Leadership to review draft Strategic Goals, Objectives and Key Results (OKR) 	<ul style="list-style-type: none"> ▪ Build understanding of how the Mission, Vision, Value validation and SWOT roll up into Strategic Goals focus areas ▪ Discuss frameworks and expectations about measuring success to determine if this is the “right” set of OKRs.
Step 5: Present Three-Year Strategic Plan	Sept Draft Nov Final	<ul style="list-style-type: none"> ▪ Prepare, meet, refine presentation and recommendations to Health Service Board 	<ul style="list-style-type: none"> ▪ Present Three-Year Strategic plan to the Board
2022 All Staff Retreat	Sept	<ul style="list-style-type: none"> ▪ Seek ongoing insights about how SFHSS staff members see themselves/their work in the Strategic Planning process. 	<ul style="list-style-type: none"> ▪ Refine strategy based on feedback
Membership Engagement	Q1 2023	<ul style="list-style-type: none"> ▪ Seek ongoing insights around key strategic planning concepts through surveys with diverse membership groups 	<ul style="list-style-type: none"> ▪ Refine strategy based on feedback
Strategic Planning Implementation Meetings	Quarterly	<ul style="list-style-type: none"> ▪ Ongoing internal meetings to monitor data collection/reporting for Objectives and Key Results. 	<ul style="list-style-type: none"> ▪ Align tactical resources and implementation to connect day to day work to measures of success.

Big Picture View



Environmental Scan

Influence and Strategy

Considering factors inside/outside of the organization

Impact to long-term viability of the organization



Analyze strengths, weaknesses, opportunities, and threats

Internal Factors - Toolkit Assessment Summary

The executive team met to review key documents and discuss the following questions:



What issues suggested by the assessment findings must we address in order to fulfil our mission?



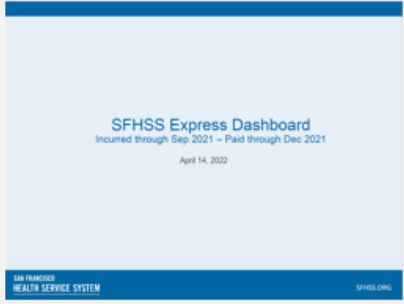
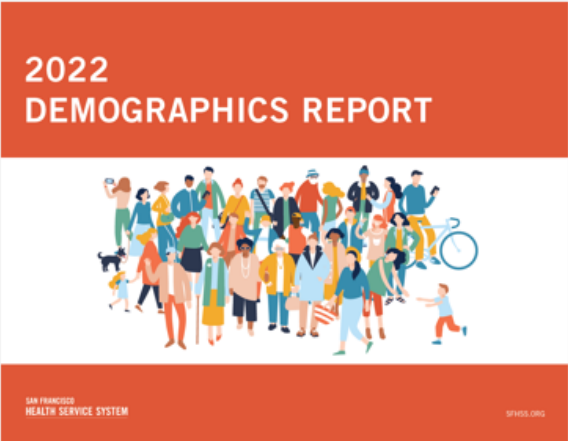
Are SFHSS Operations (including Well-Being) configured to address these issues?

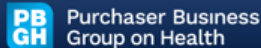


Are benefits aligned to meet the needs of our members?



SFHSS Project Portfolio: how can we best align the rates and benefits timelines with interdivisional initiatives/resources





External Factors – Leading Health Authorities

Gathered insights from other state and national health reporting authorities:

- SFHSS is represented on the Department of Managed Healthcare (DMHC) Health Equity and Quality Committee
- SFHSS is represented on the Integrated Healthcare Association (IHA) Board of Directors
- Exploring data from the IHA California Regional Health Care Cost & Quality Atlas
- Staying tuned to the California Department of Health Care Access and Information (HCAI) about the development and administration of a statewide Healthcare Cost Transparency Database (All Payer Claims Database).
- Tracking legislation elevated by Covered CA that is intended to provide lower cost and expanded access to quality health insurance for Californians.
- Aligning with Pacific Business Group on Health (PBGH) on a supporting measure set that establishes evidence-based clinical markers of Advanced Primary Care.

External Factors – Subject Matter Expertise

Strategic Planning Special Meeting & Health Service Board
Educational Presentations:

- Population Mental Health: Creating A Culture of Caring – Deryk Van Brunt, DrPH, UC Berkeley
- Revitalizing Primary Care - Kevin Grumbach, MD, University of California, San Francisco
- Aging and aging well in the 21st century – Joseph Agostini, MD, United Healthcare
- Geriatrics Overview and Strategy – Michael D. Mason, MD, Kaiser Permanente
- Genomics and Pharmacy High-Cost Drugs – Almaz Dawit, PharmaD, AON
- Well-Being at Work Conversation with diverse city departments



Internal & External Factors – Expanded Leadership Workshop and Discussion

Staff bring diverse perspectives from their divisions in addition to their unique lived experiences as a part of our membership:

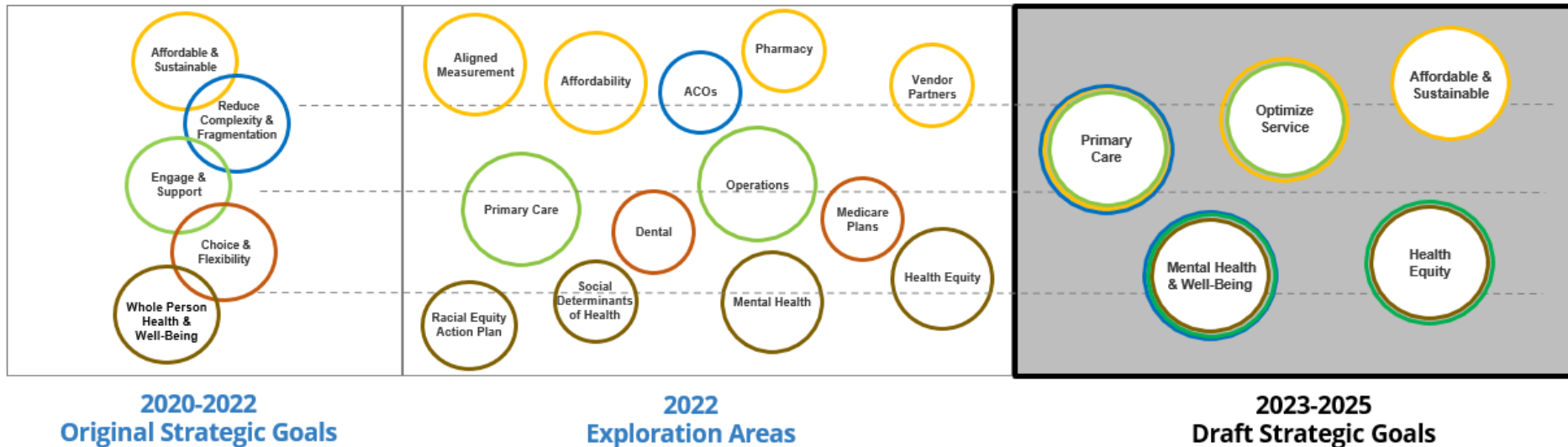
- Spectrum Dot Exercise to gather input around the current and future state of our benefits approach structure
- Large/Small Group Discussion to review draft Strategic Goal focus areas and objectives
- Identifying strengths, weaknesses, opportunities, and threats (SWOT) to strategic planning success



SWOT Analysis Summary and DRAFT Strategic Goals

	Affordability & Sustainability	Primary Care	Health Equity	Mental Health & Well-being	Optimize Service
<p>Strengths: The assets, resources, or capabilities that have the greatest positive impact on SFHSS' success</p>	<ul style="list-style-type: none"> Stable trust and fiscal responsibility Purchasing power Attractive benefits & contributions 	<ul style="list-style-type: none"> Member-centric focus Comprehensive benefits Choice 	<ul style="list-style-type: none"> Transparency Member-centric focus Inclusive environment Respect and transparency 	<ul style="list-style-type: none"> Member-centric focus Purchasing power Enabling advocacy 	<ul style="list-style-type: none"> Member-centric focus Transparency Inclusive Feedback encouraged Focus on review and improvement
<p>Weaknesses: The aspects of SFHSS that are weaknesses and that hinder goal implementation</p>	<ul style="list-style-type: none"> Prop B & C Targeting specific claim drivers for intervention (e.g., diabetes programs) 	<ul style="list-style-type: none"> Confines of SFHSS structure Identifying areas of control vs. influence 	<ul style="list-style-type: none"> Confines of SFHSS structure: public, board, relationships with other departments Targeting interventions 	<ul style="list-style-type: none"> Confines of SFHSS structure Culture of care / safe space 	<ul style="list-style-type: none"> Confines of SFHSS structure Process and documentation is lacking Budget Turnover
<p>Opportunities: Factors that offer a genuine opportunity to benefit SFHSS in goal implementation</p>	<ul style="list-style-type: none"> Labor negotiations Savings from removing duplicate programs Engage waived members for outreach to enroll 	<ul style="list-style-type: none"> Communication and engagement Vendor partnerships to accelerate initiatives 	<ul style="list-style-type: none"> Relationships with other departments Focus on targeted populations/ departments 	<ul style="list-style-type: none"> Communication and engagement: OE, dependents, waived Promote open dialogue / leverage wellbeing champions 	<ul style="list-style-type: none"> Inclusive member engagement: website / language Process documentation Decision-making engagement
<p>Threats: Conditions, trends, and other forces that could potentially impact goal implementation if not addressed.</p>	<ul style="list-style-type: none"> Budget Medical and pharmacy trend Bay Area costs 	<ul style="list-style-type: none"> Fragmentation of plans/benefits Provider shortages 	<ul style="list-style-type: none"> Budget Lack of comprehensive data 	<ul style="list-style-type: none"> Budget Fragmentation of plans/benefits Provider shortages 	<ul style="list-style-type: none"> Budget Retirement/turnover Balancing tech and touch

Where we are / What we explored / Where we landed



- Key:**
- Large circles: high priority areas
 - Medium circles: mid-range priority or embedded within another area
 - Small circles: low priority or low influence/control

We are growing and
changing as an
organization/society

They are perceived as
buzzwords

Validating
Mission
Vision
Values

Why?

They aren't defining
what sets us apart as an
organization

They are top-down
values

Reflection

Behind the scenes/on the 'inside'

Proudly serving others

All Staff Meetings

Famers Market

Improving health of all members

Humor and Joy

Guiding members

Forefront of change, drive partnerships

Connection to resources and education

Responsibility

Passion in being small but mighty

Equity & inclusion

Personalized interactions

Helping people find relief

Focus on community service

Everyone jumps in to help

Discussion

Question

- What would you miss about working at SFHSS



How does this resonate with our existing

- Values
- Vision
- Mission

Mission

Current: We are dedicated to preserving and improving sustainable, quality benefits and to enhancing the well-being of members and their families.

Proposed: Ensuring equitable, sustainable, and quality benefits that enhance well-being of members and their families throughout the lifecycle.

Vision


Current: Our vision respects the whole person's well-being in offering supportive programs and services that enable positive engagement and health experience.

Proposed: Engagement in personalized care that centers disease prevention and equitable services for optimal member health.

Values

Current:
Respect, Stewardship, Excellence, Collaboration, Inclusivity

Proposed:
Inclusion, Compassion, Operational Excellence, Collaboration, Alignment




Objectives should motivate and challenge the team

Strategic Goals, Objectives and Key Results

Draft 2023-2025

Key results are a set of metrics that measure your progress towards the objective



Strategic Goals and Objectives—Draft Summary

Goal 1: Provide **affordable and sustainable** healthcare and high-quality well-being services through value driven decisions and program design.

- Objective: Ensure sustainable funding
- Objective: Maintain Board Education

Goal 2: Advance advanced **primary care** and member engagement to ensure the right care, at the right time and place.

- Objective: Improve primary care and well-being services
- Objective: Enhance equity in the delivery of primary care services

Goal 3: Foster **health equity** through intentional organizational culture, accessibility, inclusion, and belonging.

- Objective: Ensure health equity lens is applied to our customer service approach
- Objective: Ensure health equity lens is applied to our workforce environment

Goal 4: Support the **mental health and well-being** of our membership by reducing stigma and addressing barriers to care in partnership with key stakeholders.

- Objective: Provide easily accessible pathways to mental health and substance use disorder services through increased member awareness
- Objective: Enhance programs to support early retiree and retiree well-being

Goal 5: **Optimize service** to maintain and advance exceptional member and stakeholder engagement.

- Objective: Enhance member education and support services
- Objective: Improve staff training and professional development
- Objective: Implement quality assurance reviews

Our Mission

Ensuring equitable, sustainable, and quality benefits that enhance well-being of members and their families throughout the lifecycle.

Our Vision

Engagement in personalized care that centers disease prevention and equitable services for optimal member health.

Our Values

Inclusion
Compassion
Operational Excellence
Collaboration
Alignment

Strategic Goal 1

Provide **affordable and sustainable** healthcare and high-quality well-being services through value driven decisions and program design.

Objective	Key Results			
Ensure sustainable funding	Q3 each year: Manage change in healthcare spend as compared to national and local trends			
	1 (Fails to Meet) 10% higher	2 (Inconsistently Meets) 5% higher	3 (Meets) Equal	4 (Exceeds) Less than
	Q2 each year: Forecast Health Sustainability Fund Revenues ability to fund necessary expenditure			
	1 (Fails to Meet) 10% less	2 (Inconsistently Meets) 5% less	3 (Meets) Equal	4 (Exceeds) Higher
	Q3 each year: Use Health Plan Price Transparency data to influence SFHSS cost of care in comparison to national and local trends			
	1 (Fails to Meet) 10% higher	2 (Inconsistently Meets) 5% higher	3 (Meets) Equal	4 (Exceeds) Less than
Maintain Board Education	Q4 each year: Support Health Service Board knowledge and understanding of their role in assuring affordable health benefits are offered to SFHSS members through securing educational and consultative services including actuarial, fiduciary, legal and other experts			
	1 (Fails to Meet) Not at all aware	2 (Inconsistently Meets) Somewhat aware	3 (Meets) Moderately Aware	4 (Exceeds) Very Aware

Strategic Goal 2

Advance advanced **primary care** and member engagement to ensure the right care, at the right time and place.

Objective	Key Results			
Improve primary care and well-being services	Q2 2023: Improve primary care effectiveness by setting baseline standard metrics and improvement targets			
	1 (Fails to Meet) No action towards evaluation and improvement strategies	2 (Inconsistently Meets) Evaluation and/or improvement strategies in process	3 (Meets) Evaluation and improvement strategies complete	4 (Exceeds) Opportunities embedded into renewal and contracting
	2023-2025: Improve population health outcomes in the measurement plan through alignment with other purchasers and healthcare providers			
	1 (Fails to Meet) Baseline data not reported	2 (Inconsistently Meets) Baseline data reported Q1 2023	3 (Meets) Incorporate informed data requests into PY 2025 Renewal Requests Q3 2023	4 (Exceeds) Require a deliberate and consistent approach to assessing health outcomes of underserved populations by Q4 2025
Enhance equity in the delivery of primary care services	Q4 2023: Adapt methodology, standards, reporting requirements and goals for primary care spend and total cost of care			
	1 (Fails to Meet) No action towards standards, reporting or goals	2 (Inconsistently Meets) Standards, reporting and/or goals in process	3 (Meets) Standards, reporting and goals established	4 (Exceeds) Standards, reporting and goals included in renewal and contracting
Enhance equity in the delivery of primary care services	Q4 2025: Require stratification of four nationally recognized equity measures to improve quality of care for underserved populations			
	1 (Fails to Meet) Data measures not identified	2 (Inconsistently Meets) Analyze high risk/high-cost conditions Q1 2023	3 (Meets) Incorporate informed data requests into PY 2025 Renewal Requests Q3 2023	Require a deliberate and consistent approach to assessing health outcomes of underserved populations by Q4 2025

Strategic Goal 3

Foster **health equity** through intentional organizational culture, accessibility, inclusion, and belonging.

Objective	Key Results			
Ensure health equity lens is applied to our customer service approach	Q4 2022: 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			
	1 (Fails to Meet) 25% Not at all aware	2 (Inconsistently Meets) 50% Somewhat aware	3 (Meets) 75% Moderately Aware	4 (Exceeds) 100% Very Aware
	Q1 2023: Recruit representatives from multiple SFHSS divisions to form Health Equity Advisory			
	1 (Fails to Meet) Advisory does not meet	2 (Inconsistently Meets) Advisory meets infrequently	3 (Meets) Advisory Meets Quarterly	4 (Exceeds) Advisory advances recommendations to Executive Leadership quarterly
Ensure health equity lens is applied to our workforce environment	Q4 2023: Use mixed training methods to expand collective knowledge about diversity, racial equity, and health equity-related concepts			
	1 (Fails to Meet) Training not conducted	2 (Inconsistently Meets) Partial completion	3 (Meets) Full completion: -Biannual training for Leadership/All Staff -Annual training for Health Service Board Commissioners	4 (Exceeds) Full completion and evidenced by behaviors as measured by pre/post survey knowledge, awareness, and skill development
	Q2 2024: Conduct bi-annual workforce demographic analysis using provided Department Human Resources Workforce Dashboard			
	1 (Fails to Meet) Analysis incomplete	2 (Inconsistently Meets) Partial completion	3 (Meets) Workforce analysis completed bi-annually	4 (Exceeds) N/A

Strategic Goal 4

Support the **mental health and well-being** of our membership by reducing stigma and addressing barriers to care in partnership with key stakeholders.

Objective	Key Results			
Provide easily accessible pathways to mental health and substance use disorder services through increased member awareness	Q1 2023: Conduct a mental health vendor summit to support alignment around clear pathways to navigating mental health and emotional well-being resources and services			
	1 (Fails to Meet) Do not host the summit	2 (Inconsistently Meets) Partially plan the summit	3 (Meets) Host summit to identify the navigation process and gaps to accessing resources and services	4 (Exceeds) Fill in the gaps and inform members
	Q3 Annually 2023-2025: Create mental health campaign to increase utilization of mental health and substance use disorder resources and services			
	1 (Fails to Meet) No change in utilization	2 (Inconsistently Meets) <5% increase in utilization	3 (Meets) 5% increase in utilization	4 (Exceeds) >5% increase in utilization
	Q1 2024: Recruit members among city departments to form an Employee Assistance Program (EAP) advisory group			
1 (Fails to Meet) No recruitment	2 (Inconsistently Meets) Partial recruitment	3 (Meets) Recruitment completed	4 (Exceeds) Advisory meets quarterly	
Enhance programs to support early retiree and retiree well-being	Q4 2023: Identify evidence-based and best practice approaches to enhancing retiree well-being			
	1 (Fails to Meet) No research completed	2 (Inconsistently Meets) Research has begun but program is not secured	3 (Meets) Program identified	4 (Exceeds) Pilot program timeline has been implemented

Strategic Goal 5

Optimize service to maintain and advance exceptional member and stakeholder engagement.

Objective	Key Results			
Enhance member education and support services	Increase the percentage of members who agree to the electronic delivery of all Employee Benefit Notices by 5% year-over-year			
	1 (Fails to Meet) Collection of electronic disclosure not completed	2 (Inconsistently Meets) Below annual targets	3 (Meets) Achieves Target of 5% by Q4 2023, 10% by Q4 2024, 15% by Q4 2025	4 (Exceeds) Exceed annual targets
	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			
	1 (Fails to Meet) Survey not completed	2 (Inconsistently Meets) <2% Increase in member satisfaction	3 (Meets) Develop baseline in Q2 2023 Achieves Baseline +2% by Q2 2024 Achieve Baseline +4% by Q2 2025	4 (Exceeds) >2% Increase in member satisfaction
	Improve the First Call Resolution rate by 2% year-over-year for calls placed to SFHSS Member Services			
	1 (Fails to Meet) Decrease in first call resolution rate	2 (Inconsistently Meets) <2% increase in first call resolution rate	3 (Meets) Baseline is 73% Achieve Target of 75% by Q4 2023, 77% by Q4 2024, 79% by Q4 2025	4 (Exceeds) >2% Increase in first call resolution rate
	Q4 2023: Develop member portal for personalized benefits information and wellness engagement			
	1 (Fails to Meet) Portal not developed	2 (Inconsistently Meets) Portal partially developed	3 (Meets) Portal development completed	4 (Exceeds) Portal developed with enhanced features

Strategic Goal 5

Optimize service to maintain and advance exceptional member and stakeholder engagement.

Objective	Key Results			
Improve staff training and professional development	Q4 2023: Document, analyze, and improve standard operating processes in the Member Services Division			
	1 (Fails to Meet) Documentation not completed	2 (Inconsistently Meets) Documentation partially completed	3 (Meets) Documentation of standard operating processes completed	4 (Exceeds) Efficiency improvements based on standard operating processes
	Q2 2024: Develop standardized training for SFHSS Operations staff focusing on general customer service skills and program specific education			
	1 (Fails to Meet) Training not developed	2 (Inconsistently Meets) Training partially developed	3 (Meets) Training development completed	4 (Exceeds) Training implemented
	Q4 2023: Each Call Center staff provides input (through case narratives) that leads to Salesforce Knowledge Base Articles being updated 2x/year			
	1 (Fails to Meet) Management does not evaluate staff	2 (Inconsistently Meets) Management infrequently evaluates staff	3 (Meets) Management evaluations are completed, staff meet the documentation target and Knowledge Base Articles are updated 2x/year	4 (Exceeds) Management evaluations are completed, staff meet the documentation target and Knowledge Base Articles are updated >2x/year
	Q4 2023: All Call Center staff are provided with 2 internal process improvement opportunities that involve cross-functional team participation and that promote career development			
	1 (Fails to Meet) No process improvement opportunities provided	2 (Inconsistently Meets) Inconsistent process improvement opportunities provided	3 (Meets) 2 process improvement opportunities provided	4 (Exceeds) >2 process improvement opportunities provided
	Increase percentage of staff that report readiness: having access to the knowledge, training resources, and tools that they need to complete Open Enrollment-related tasks successfully, as measured by agree or strongly agree through survey response			
	Decrease in staff reported readiness	<85% reported staff readiness	3 (Meets) Baseline staff reported readiness is 69% Achieve Annual Target of 85%	>85% reported staff readiness

Strategic Goal 5

Optimize service to maintain and advance exceptional member and stakeholder engagement.

Objective	Key Results			
Improve quality assurance review processes	Q4 2024: Develop formal Quality Assurance (QA) Standards for the Member Services functions*			
	1 (Fails to Meet) No QA standards developed	2 (Inconsistently Meets) Partial QA standards developed	3 (Meets) Management develops standards for evaluating all Member Services functions	4 (Exceeds) Management develops standards for evaluating Member Services functions with accompanying process improvement
	Beginning in Q1 2025: Conduct formal Quality Assurance reviews of the Member Services functions*			
	1 (Fails to Meet) Quality Assurance reviews are not conducted	2 (Inconsistently Meets) Quality Assurance reviews conducted in some areas	3 (Meets) Quality Assurance reviews conducted in all areas	4 (Exceeds) Quality Assurance reviews conducted in all areas and the frequency of staff meeting the standards increase

*Member Service functions include responding to calls to the SFHSS Call Center, processing of Benefit Administration System (BAS) transactions, administering carrier and internal SFHSS discrepancy reports, and processing premium delinquency actions.

Strategic Planning Lessons Learned

- Strategy is a roadmap for change
- Discern between day-to-day vs. strategic work
- Develop a big picture view of influences that shape our work
- Your Voice Matters

Next Steps

- All Staff Retreat: seeing ourselves/our work in the plan
- PDF Strategic Plan Template currently under development
- Return for final draft Strategic Plan presentation in November

