



**2023-2025**   
**STRATEGIC PLAN REPORT**



# SFHSS 2023-2025 Strategic Plan Annual Progress Report to Health Service Board

January 9, 2025

Presented by:

Leticia Harris, Senior Health Program Planner

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## Agenda

- *Strategic Planning Development Milestones*
- *Lead with Equity Approach*
- *Overview of Annual Progress per Goal Area*
- *Strategy Execution for The Road Ahead*

## Presentation Aim

- *Reporting on a subset of active 2024 goal areas only, not initiatives that have just begun in Jan 2025 or those that have yet to begin in 2025*
- *Seek ongoing collaborative input to support strategy implementation*

### **Our Vision**

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

### **Our Mission**

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

### **Our Values**

Inclusion, Compassion, Operational Excellence, Collaboration, Alignment, Accountability

# SFHSS Strategic Planning Development Milestones

Staff Engagement: Kick off to 2023-2025 Planning Cycle

Spectrum Dot & SWOT Analysis

Introduced Current State Assessment Toolkit

Health Service Board Special Meeting about Future State with CCSF Departments, vendor partners, AON experts, and members of the public

Board Education: Primary Care and Mental Health

2023 Strategic Plan Annual Progress Report to Health Service Board

Staff Engagement: Post Open Enrollment Survey

Board Education: Market and Health System Innovation, Benefit Design Benchmarking and Plan Design Influence, Determining City Contribution, Future State Opportunities for SFHSS, Fiduciary Training and Employer Budget Positions

2024 Strategic Plan Annual Progress Report to Health Service Board

Staff Engagement: 2022 All Staff Retreat

Board Education: Addiction Services including Medication Assisted Treatments

Presentation 3 Year Strategic Plan Draft and Final Iteration

Spring '22

Summer '22

Fall '22

Winter '22-Sum '23

Fall - Winter '23

Spring-Fall '24

Winter '24

Staff Engagement: Objectives and Key Results Refresh Mission, Vision and Values

Board Education: Geriatrics: Retiree Health, Geriatrics Overview and Strategy, and Genomic and High Cost Drugs

2022 Strategic Plan Annual Progress Report to Health Service Board

Board Education: HIPAA Training, Healthcare Cost and Trend Influencers, and Healthcare Ecosystem and Market Overview

Staff Engagement: 2024 All Staff Retreat and Member Services Open Enrollment Survey

Member Engagement: 2024 Your Opinion Matters Membership Survey

Board Education: HIPAA Training and Update to the Advances Primary Care Practice Goal

- A health system that examines the link between cost, quality, and health equity contributes to greater **affordability and sustainability**.
- There are concrete practice policy-level actions that **primary care** stakeholders can pursue to reduce health inequities.
- Fostering **equity** is a positive catalyst to organizational culture, accessibility, inclusion, and belonging for our membership.
- Risk factors tied to **mental health and well-being** are heavily associated with social determinants and inequalities among marginalized groups.
- **Optimizing service** through member engagement and outreach can be a vehicle for reducing health disparities and advancing health equity.

# LEAD WITH EQUITY





Goal 1: Foster **equity** through intentional organizational culture, accessibility, inclusion, and belonging.

## City-wide Racial Equity Mandate

The Office of Racial Equity (ORE) was formally created by legislative ordinance No 188-19. ORE serves as a new division of the Human Rights Commission with authority to create a citywide Racial Equity Framework and mandate the completion of departmental Racial Equity Action Plans (REAP).

[www.racialequitysf.org](http://www.racialequitysf.org)

## Government Alliance for Race & Equity

The City and County of San Francisco is a part of GARE's national network of municipal, regional and state governments (100 cities and 30 states) working to achieve racial equity and advance opportunities for all.

[www.racialequityalliance.org](http://www.racialequityalliance.org)



# Office of Racial Equity Peer Learning Cohorts (PLC)

PLCs are an evidence-based model used extensively across the City for collaborative learning:

<p><b><u>Pipelines Cohort</u></b></p> <p>Sharing and reflecting on practices departments have tried around equitable entry points into their departments (e.g. recruitment, internships, interviews, job descriptions, etc.)</p>	<p><b><u>Pathways Cohort</u></b></p> <p>Sharing and reflecting on practices departments have tried around equitable professional development, mentorship, pathways for employee mobility, etc.</p>	<p><b><u>Culture Cohort</u></b></p> <p>Sharing and reflecting on practices departments have tried around creating belonging and safety, such as supporting affinity spaces, engaging staff, receiving employee feedback, etc.</p>	<p><b><u>Justice Cohort</u></b></p> <p>Sharing and reflecting on practices around belonging and understanding, specifically for law enforcement and justice departments.</p>
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**Key Outputs of Culture Cohort**

- Assessment of Racial Equity Roles and Skills Sets
- Structuring Racial Equity Work for Impact
- Creating a Culture of Belonging and Psychological Safety
- Affinity Groups Best Practices

# Office of Racial Equity Sponsored Employee Trainings

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*



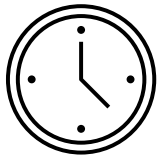
Developing a Culture of Belonging



An Antiracist Approach to Retention & Advancement



Fundamentals of Equitable Employee Development



Hours invested in Equity Sponsored Trainings will be coupled with DHR Trainings for a Reporting Period July 2024-June 2025

**47 of 80 hours completed**  
**More than halfway there!**

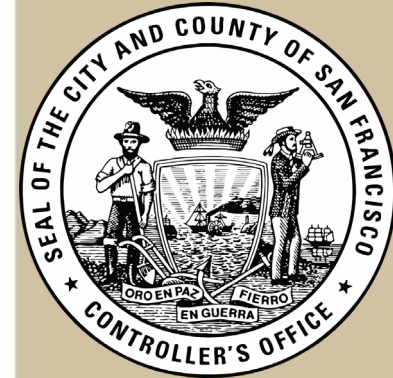


# San Francisco Performance Program

SFHSS is contributing a new Equity Measure to the Controllers Office as part of the San Francisco Performance Program to be reported in the Mayor's Budget Book.

**New Measure:**

**Total mixed training hours completed to expand collective knowledge about diversity, racial equity, and equity-related concepts**



**Program Goals:**  
Support transparent, data-driven decisions in policy development and operational management  
Provide departments with the tools they need to learn and innovate.



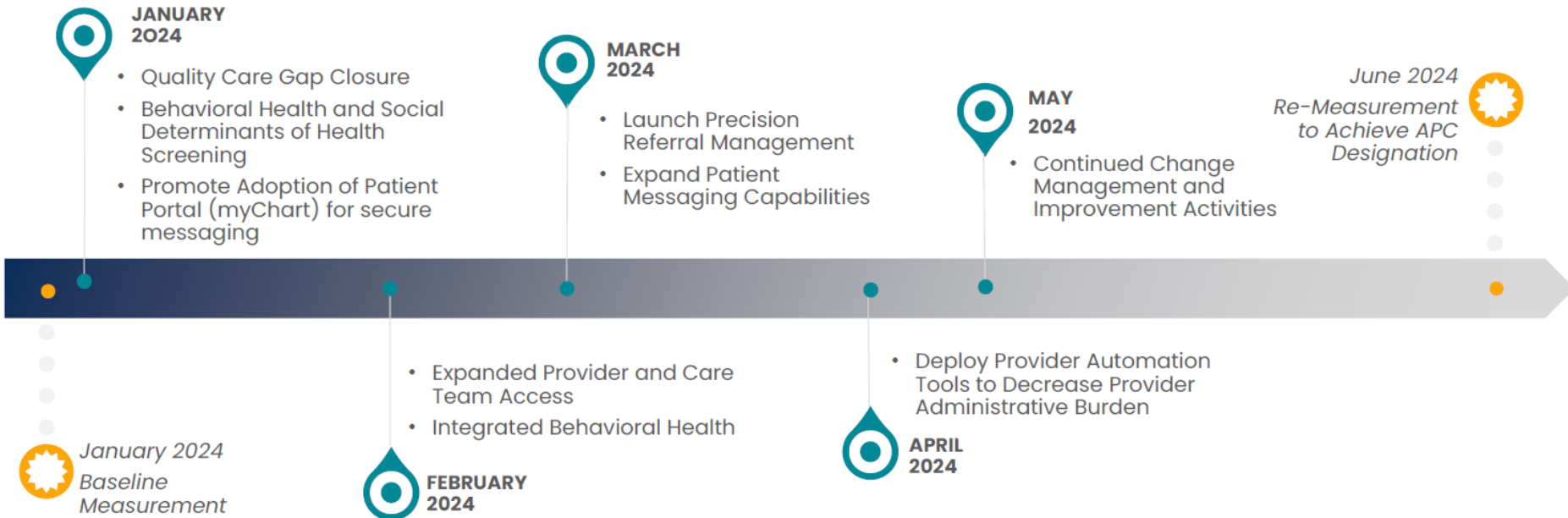
The Performance Program reports annual performance data for every department in the City that contribute to performance scorecard.



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

# Advance Primary Care Milestones

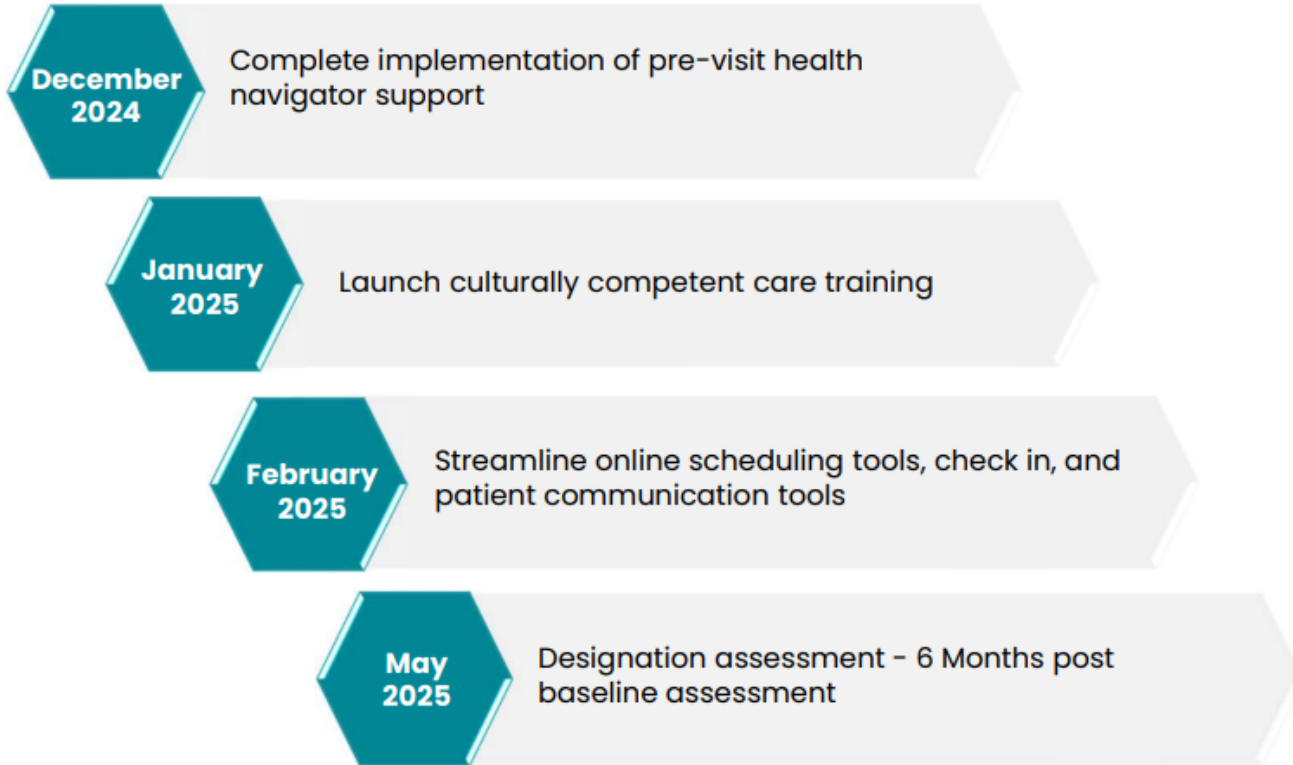
SFHSS is building the Advance Primary care pilot model in collaboration with Purchaser Business Group on Health, Blue Shield of California, and Brown & Toland. The target date for the first market test is Jan 2024 with an evaluation of the results in June 2024.



# APC Implementing and Planning Phase II and Phase III



## Phase II – Brown and Toland Network Practices Next Steps



*Phase III expansion planning in progress to focus on further scaling of advanced primary care*

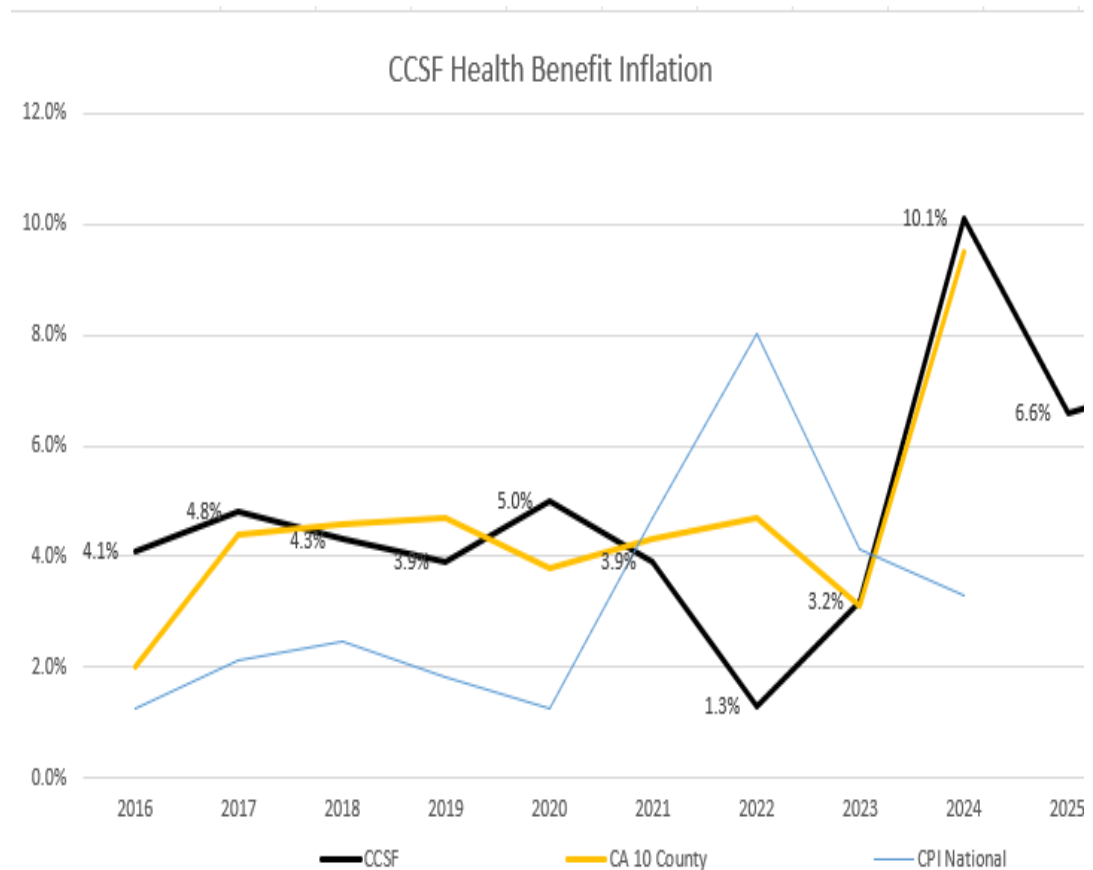


Goal 3: Provide **affordable and sustainable** healthcare and high-quality well-being services through value-driven decisions and program design.

# Affordability and Sustainability

## SFHSS Cost vs. Benchmarks

- Healthcare costs have high variability and historically outpace CPI
- Average SFHSS' rate increases are lower than local trends during the past five years
- The rates for plan year 2024 were high due to lagging impact of rising inflation
- For the 2025 plan year, we conducted an RFP for the MA PPO plan saving \$67 million over 3 years.
- Favorable SFHSS target rate trend in 2025 of 6.6% vs 8% national healthcare inflation benchmark.
- Will conduct an RFP for LTD and Life Insurance for plan year 2026
- SFHSS is participating in California Office of Health Care Affordability's (OHCA) Board. To meet the affordability goals, OCHA has set maximum cost increase targets
- Providing education on the role of the Health Service Board
  - In 2024 four education presentations were given to the board. See Appendix for detail





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.

# Mental Health Vendor Summit

- ✓ Identify priorities for action, based on vendor summit key findings
  - Communication
  - Training
  - Assessment
- ✓ Digitizing the journey map for accessible pathways





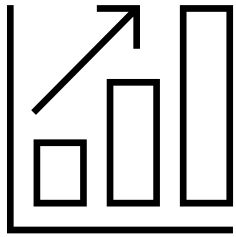
# Enhancing Retiree Well-Being

- Ensure alignment of well-being services and monitoring the mental health benefits during the MAPD PPO transition
- Enhanced Behavioral Health reporting from Health Plans

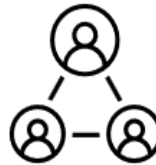
# Well-Being Annual Mental Health Campaign

## HIGHLIGHTS

Goal: **5% increase** in utilization from prior year



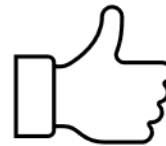
**15.9% increase** in utilization from prior year



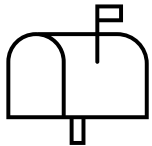
Partnered with **13 department head/directors** to create a video message that resulted in over **930 views**.



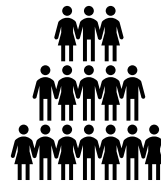
**12% increase** in participation for trainings/workshops



**100%** of participants in Mental Health First Aid training indicated it was valuable to them both personally and professionally.



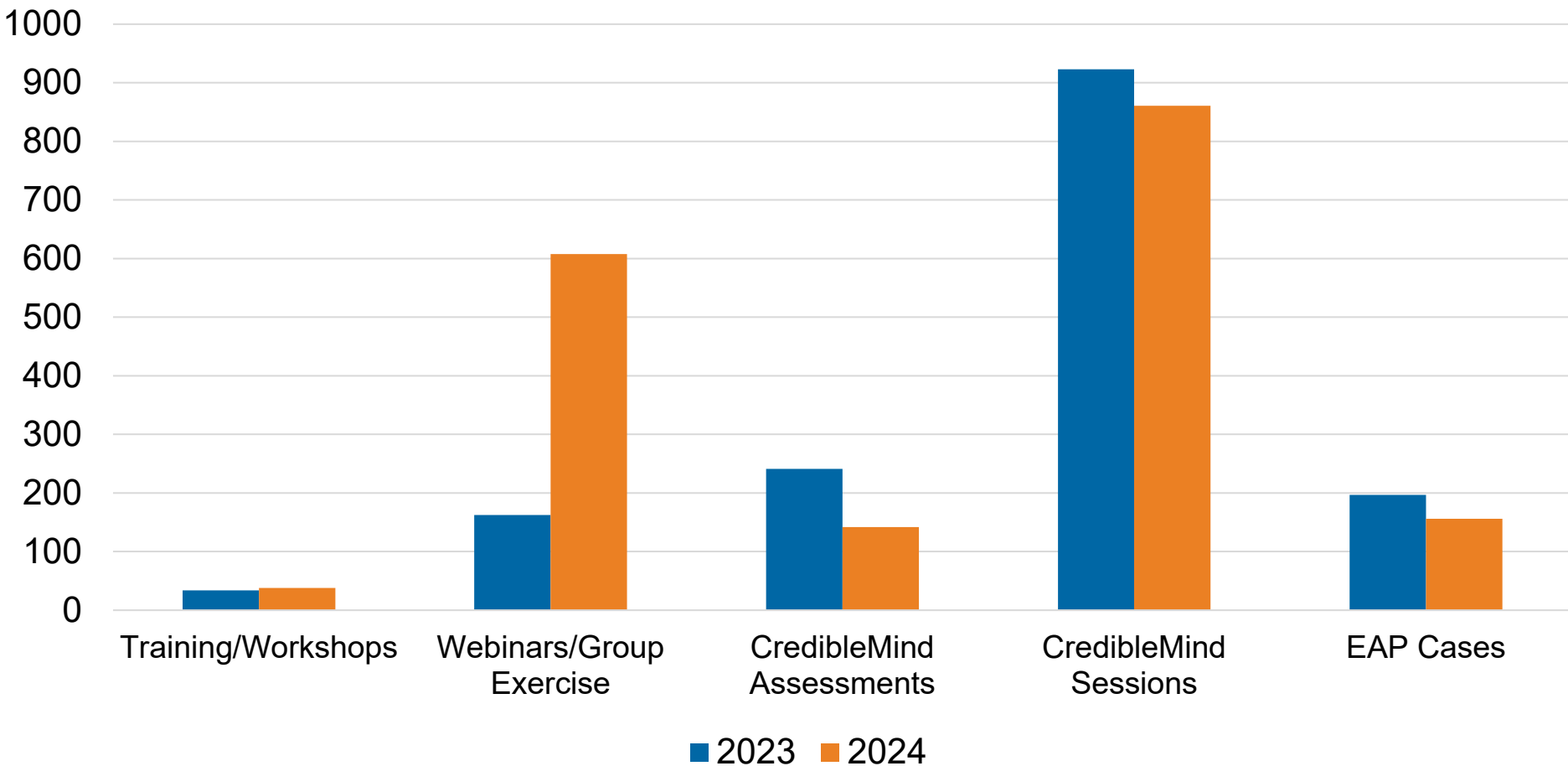
**49,335** total email clicks



**274% increase** in participation in webinars/group exercise classes compared to prior year

# Well-Being Annual Mental Health Campaign

Year Over Year: Mental Health Awareness Month Participation





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

# 2024 Member Satisfaction Survey

**Goal:** Improve member satisfaction by 2% year-over-year.

**2024 Action:** Establish the baseline for member satisfaction with phone and in-person support.



**Satisfaction Score: Satisfied or Higher 58%**



**Net Promoter Score of 26%**



**Satisfaction Score: Unsatisfied 22%**



**Satisfaction Score: Neutral 20%**

# Completed Standard Operating Procedures (SOP) and Trainings in 2024

**Goal:** Continue to complete Standard Operating Procedures for Member Services Division workstreams.

**2024 Action:** Documented business processes based on priorities and needs, created staff trainings, updated member facing forms and notices and established a New Hire Training plan for new 1210 Benefits Analyst employees.



**11 Business Processes Document**  
Developed a new employee training plan



**8 Non-Open Enrollment Trainings Completed**



**5 Member facing notices redeveloped**

# Member Services Staff Open Enrollment Training Satisfaction Survey

**Goal:** Establish Member Services staff satisfaction and competency in supporting members during Open Enrollment (OE)

**2024 Action:** Established 9 OE specific trainings focusing on PY2025 changes



## Staff Training Readiness Response

- 90% Satisfaction Rate
- 59% Response Rate



## Trainings Provided

- 8/4/24: Blue Shield MAPD PPO Transition Call Center Training and Escalation Processes
- 8/7/24: Blue Shield Medicare Advantage Prescription Drug Plan
- 8/7/24: Salesforce Case Narrative Update
- 8/8/24: People Soft Open Enrollment Query Review
- 9/12/24: Open Enrollment PY 2025 Benefit Changes and System Updates
- 9/17/24: Health Net Canopycare SFHSS Training Plan Year 2025
- 9/19/24: Open Enrollment for Plan Year 2025, Member Communications, and Operational Logistics Training
- 9/23/24: Cisco Webex Warm Transfer Training
- 9/26/24: ESA OE Systems Training

# SFHSS Call Center Quality Assurance: Call Evaluations

**Goal:** Establish Quality Assurance(QA) measures for Member Services workflows

**2024 Action:** Created a QA measure for call reviews.

## I.C.A.R.E.

Introduction

Connect

Ask

Respond

Exit

Customer Service and Information Accuracy Criteria and Sample Evaluation Log.

Caller Information		Type of Call	1-NA scoring left blank not applicable to call
Date:	Time:		
DSW:			
DOB:			
<b>I. C. A. R. E</b>			
<b>INTRODUCTION</b>			Yes(+) NO(-) Call 1 Feedback
1. Utilize the proper Greeting (Thank you for Calling the Health Service Systems)	0		
2. Provide your first name	0		
3. Confirm Members Identity, call back number, current address	0		
4. Ask "How may I help you?" to determine the reason for the call	0		
5. Takes ownership/Expresses willingness to help	0		
(1pts each category, Total Score 5 pts)		0	
<b>CONNECT</b>			
6. Look up the member's DSW # to confirm/correct the demographic information	0		
7. Address caller by members preferred name	0		
8. Actively listen to caller's request	0		
9. Verify and confirm members identity	0		
10. Acknowledge, empathize, and/or apologize to the caller when the caller reports an issue, a concern, or a complaint	0		
(1pts each category, Total Score 5 pts)		0	
<b>ASK</b>			
11. Maintain a courteous, professional, and positive tone	0		
12. Build & Maintain Rapport- Establish a comfortable atmosphere	0		
13. Ask clarifying questions to understand the nature and the urgency of the call	0		
14. Placed Member on hold appropriately - Provided updates every few minutes	0		
(1 points each category, Total Score 5)		0	
<b>RESPOND</b>			
15. Repeat and confirm caller's inquiry	0		
16. Provide options to the caller	0		
17. Exhibit appropriate call control (redirect the member to the purpose of the call)	0		
18. Explain the steps you will be taking to assist member	0		
(1 points each category, Total Score 4)		0	
<b>EXIT</b>			
19. Ask "Is there anything else that I can help you with?"	0		
20. Recap the follow-up plan/next steps with the caller if haven't completed	0		
21. Document the call in detail including steps taken to assist member	0		
22. End the call gracefully with professional statement (Thank you for calling)	0		
(1 points each category, Total Score 4)		0	
Total Form Score			0
Staff Score			0.0
<b>Goals/Action Plan:</b>	<b>Follow-up Date:</b>	<b>BA Comments:</b>	





## SFHSS Strategy Execution For the Road Ahead

SFHSS has made a critical investment in the forward direction and momentum of our Strategic Plan by enrolling in the Harvard Business School *Strategy Execution Course*. This course equips current and aspiring leadership with tools, skills, and frameworks to allocate resources, measure performance, manage risk, and successfully implement strategy. Through this course we have explored common challenges that prevent or derail execution. We will apply these learnings to design systems and structures that meet our organization's strategic objectives for the future. Below are compelling themes that amplify lessons learned in this second year of 2023-2025 Strategic Plan implementation:



# Appendix

## Appendix:

# SFHSS Call Center Quality Assurance Call Evaluations

### Q3 Evaluation Data

Call Evaluation Criteria	% of Calls that met the standard
Utilize the proper Greeting (Thank you for Calling the Health Service Systems)	91%
Provide your first name	79%
Confirm member identity, call back number, and current address	79%
Ask, "How may I help you?" to determine the reason for the call.	84%
Takes ownership/Expresses willingness to help	96%
Look up the member's DSW # to confirm/correct the demographic information	82%
Address caller by members preferred name	43%
Actively listen to the caller's request	96%
Verify and confirm members identity	77%
Acknowledge, empathize, and/or apologize to the caller when the caller reports an issue, a concern, or a complaint	93%
Maintain a courteous, professional, and positive tone	96%
Build & Maintain Rapport- Establish a comfortable atmosphere	96%
Ask clarifying questions to understand the nature and the urgency of the call	95%
Placed Member on hold appropriately - Provided updates every few minutes	95%
Repeat and confirm caller's inquiry	91%
Provide options to the caller	88%
Exhibit appropriate call control (redirect the member to the purpose of the call)	82%
Provide correct detailed information to member	88%
Ask "Is there anything else that I can help you with?"	25%
Recap the follow-up plan/next steps with the caller if haven't completed	79%
Document the call in Salesforce including steps taken to assist member	91%
End the call gracefully with professional statement (Thank you for calling)	63%

## Appendix:

# Completed Standard Operating Procedures (SOP) and Trainings in 2024

**Goal:** Continue to complete Standard Operating Procedures for Member Services Division workstreams.

**2024 Action:** Documented 11 business processes with 8 corresponding staff training, updated member facing forms and established a New Hire Training plan for new 1210 Benefits Analyst employees.

Workstreams/Projects	Training	SOP Created	Purpose	Staff Tested
New Hire Training Plan	N/A	Y	Streamline onboarding, create a training roadmap to reduce knowledge gaps, mentor new employees to enhance retention	Y
Delta Dental Report	Y	Y	Ensure accurate processing and reduce enrollment errors	Y
Process Documentation Review Checklist	Y	Y	Reduce errors and inefficiencies, capture all process details, provide a baseline on which to build enhancements	Y
Hetch Hetchy	N	Y	Standardization and accurate processing and reduce enrollment errors within the HHP employee population	Y
DEVA Processing	Y	Y	Standardization and accurate and timely processing and member notification	Y
DEVA Terminations	Y	Y	Standardize timely advance notice to reduce enrollment disruptions	Y
Training Plan	Y - Supervisors	Y	Create a structure approach and roadmap to reduce knowledge gaps and provide direction and focus to training	N
Salesforce Narration	Y	Y	Capture all member interaction and more efficiently track and resolve member issues.	Y
Salesforce Mail Requests	Y	Y	Standardize and capture all notices sent to members to efficiently track and resolve member issues.	Y
Incomplete Enrollment Notices	N/A	Y	Standardize member notifications	N
Cisco Webex Warm Transfer	Y	Y	Enhance member experience during plan implementation and ease transition	N
BAS Processing and Out of Sequence	N	Y	Decrease analyst processing time and processing accuracy and provide the know	N
Court Order	Y	N	Existing Documentation	Y

## Appendix:

### Affordable & Sustainable Strategic Objective: Maintain Board Education

Diverse educational opportunities are provided so that Commissioners can access subject matter expertise on fiduciary, actuarial, legal, and admin matters that are pertinent to the role of the Board in Benefits' policy and governance.

<b>April 28, 2022</b>	Primary Care by Kevin Grumbach, MD (UCSF) Mental Health: Creating a Culture of Care by Deryk Van Brunt and Shimar Clements (Credible Mind)
<b>June 9, 2022</b>	Geriatrics: Retiree Health Care Joe Agostini, MD (UHC) Geriatrics Overview and Strategy by Michael Mason, MD (KP)
<b>Aug 11, 2022</b>	Genomic and High Cost Drugs by Almaz Dawit, PharmD (Aon)
<b>Nov 10, 2022</b>	Addiction Services including Medication Assisted Treatments by Eric Haram, LADC
<b>Jan 12, 2023</b>	Health Insurance Portability and Accountability Act (HIPAA) Training Rin Coleridge, SFHSS Director of Enterprise Systems and Analytics
<b>Feb 9, 2023</b>	Healthcare Cost Influencers, Iftikhar Hussain, SFHSS Chief Finance Officer, and Mike Clarke, Lead Actuary, Aon
<b>May 11, 2023</b>	Healthcare Cost Trend Influencers, Iftikhar Hussain, SFHSS Chief Financial Officer, and Mike Clarke, Lead Actuary, Aon
<b>Aug 10, 2023</b>	Healthcare Ecosystem and Market Review, Iftikhar Hussain, SFHSS Chief Financial Officer, and Mike Clarke, Lead Actuary, Aon
<b>Sept 14, 2023</b>	Market and Health System Innovation Review Anne Thompson, Senior Account Executive, Aon
<b>Nov 9, 2023</b>	Determining City Contributions for SFHSS Retiree Medical Plan Mike Clarke, Lead Actuary, Aon
<b>Nov 9, 2023</b>	Benefit Plan Design Benchmarking and Plan Design Influence on Member Plan Use Behavior, Anne Thompson, Senior Account Executive, Aon and Mike Clarke, Lead Actuary, Aon
<b>Dec 7, 2023</b>	Future State Opportunities for SFHSS: Anne Thompson, Senior Account Executive, and Mike Clarke, Lead Actuary, Aon
<b>Jan 11, 2024</b>	Fiduciary Training presented by IceMiller Legal Counsel
<b>Feb 8, 2024</b>	Employer Budget Positions presented by Ben Rosenfield and Anna Dunning, Controllers Office, Amy Baer, HR at SFUSD, and Clara Starr, Associate Vice Chancellor, CCSF
<b>Aug 8, 2024</b>	Health Insurance Portability and Accountability Act (HIPAA) Training Rin Coleridge, SFHSS Director of Enterprise Systems and Analytics
<b>Sept 12, 2024</b>	Advances Primary Care Practice Goal Update Iftikhar Hussain, SFHSS Chief Financial Officer Raymond Tsai, MD MS, Vice President, Advanced Primary Care, Purchaser Business Group on Health