

# 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</p>	Q2 2025	<p><b>Status:</b> Strategy Revised <b>Commentary:</b> Inaugural survey themes included staff familiarity with racial equity/inequality, personal culture and sharing preferences, awareness of racial equity principles, experiences with interpersonal and institutional racism, and approaching and ending racial inequities. Pulse survey themes will be included in a broader 2025 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. The Office of Racial Equity will lead a workshop in Q1 2025 about effective (or ineffective) staff survey questions, experiences using external survey vendors vs. internal staff analysts, and experiences with specific survey platforms.</p>
<p><i>Activity 1B.</i> Recruit staff representatives from multiple SFHSS divisions to form internal Equity Working Group.</p>	2024-2025	<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 decided to kick off collective racial equity working groups citywide with a fresh and more effective collaborative approach. These Peer Learning Cohorts (PLCs) are 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>Justice Cohort</b> - Sharing and reflecting on practices around belonging and understanding, specifically for law enforcement and justice departments <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. (to which SFHSS assigned to participate) <b>Key Outputs of the 2024 Culture Cohort</b> include Assessment of Racial Equity Roles and Skills Sets, Structuring Racial Equity Work for Impact, Creating A Culture of Belonging and Psychological Safety, and Affinity Groups Best Practices.</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>	2024-2025	<p><b>Status:</b> Strategy Revised <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. 6 representatives from 2 divisions attended 47 hours of training overall to carry out equity commitments in alignment with our Strategic Plan. Additional divisions will attend equity trainings in the future as staffing permit. 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> . SFHSS is also 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 Q1 2025. <b>New Measure:</b> Total mixed training hours completed to expand collective knowledge about diversity, racial equity, and equity-related concepts.</p>
<p><i>Activity 2B.</i> Conduct bi-annual workforce demographic analysis using the Department of Human Resources Workforce Dashboard.</p>	Q1 2025	<p><b>Status:</b> Deferred The Office of Racial Equity partners with the Department of Human Resources every year to provide each City and County department with required data for the bi-annual workforce demographic analysis. This includes 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). Due to bandwidth and staffing constraints The Office of Racial Equity and Department of Human Resources have yet to deliver the bi-annual workforce demographic analysis to all City/County departments, now anticipated Q1 2025.</p>

Strategic Goal: Primary Care		
<b>Business Initiative 3. Improve primary care and well-being services</b>		
<p><i>Activity 3A.</i>  <i>Improve primary care effectiveness by setting baseline standard metrics and improvement targets.</i></p>	<p>Q2 2024</p>	<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. The goal of this group is to build new payment models to support primary care and set measurement and performance standards to improve the quality of care. PBGH has set the performance certification standards at the 66th percentile. In addition to the PBGH certification standards, SFHSS continues to use some of the metrics selected by PBGH in its Health Plan 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>  <i>Adapt methodology, standards, reporting requirements and goals for primary care spend and total cost of care.</i></p>	<p>Q2 2024</p>	<p><b>Status:</b> On Track  <b>Commentary:</b> According to a study by California Health Care Foundation (CHCF) advanced primary care has demonstrated improved 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). 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>  <i>Improve population health outcomes in the measurement plan through alignment with other purchasers and healthcare providers.</i></p>	<p>2023-2025</p>	<p><b>Status:</b> On Track  <b>Commentary:</b> SFHSS is well-positioned, regarding reporting, benchmarking, and advocating for improvements in health measures for SFHSS subpopulations. This has been achieved through alignment with leading healthcare authorities including 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.</p>
<b>Business Initiative 4. Advance Equity in the Delivery of Primary Care Services</b>		
<p><i>Activity 4A.</i>  <i>Require stratification of nationally recognized equity measures to improve quality of care for underserved populations.</i></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>
Strategic Goal: Affordable and Sustainable		
<b>Business Initiative 5. Monitor Funding Sustainability</b>		
<p><i>Activity 5A.</i>  <i>Forecast Health Sustainability Fund Revenues ability to fund necessary expenditure.</i></p>	<p>Q2 2024</p>	<p><b>Status:</b> On Track  <b>Commentary:</b> Due to growing City budget deficits, the availability of the the General Fund is reduced. The Health Sustainability Fund (HSF) has filled in some funding for SFHSS strategic initiatives. In the FYE 2026 budget we will reevaluate the uses of HSF as well as the assessment used in the rate setting process to make sure that HSF remains solvent.</p>
<p><i>Activity 5B.</i>  <i>Manage change in healthcare spend as compared to national and local trends.</i></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 were 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 conducted an RFP for the MA plan for Plan Year 2025 resulting in savings of \$67 million over the three years.</p>

<p><i>Activity 5C.</i>  <i>Use Health Plan Price Transparency data to influence SFHSS cost of care in comparison to national and local trends.</i></p>	<p>2023-2025</p>	<p><b>Status:</b> Strategy revised  <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 has established the overall healthcare cost growth target for per capita spending and will 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>
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**Business Initiative 6. Maintain Board Education**

<p><i>Activity 6A.</i>  <i>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.</i></p>	<p>2023-2025</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 educational opportunities are outlined below with corresponding subject matter experts named:  1/2023 - Health Insurance Portability and Accountability Act (HIPAA) Training Rin Coleridge, SFHSS Director of Enterprise Systems and Analytics  2/2023 - Healthcare Cost Influencers, Iftikhar Hussain, SFHSS Chief Finance Officer, and Mike Clarke, Lead Actuary, Aon  5/2023 - Healthcare Cost Trend Influencers, Iftikhar Hussain, SFHSS Chief Financial Officer, and Mike Clarke, Lead Actuary, Aon  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- Employer Budget Positions: 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)  8/2024 Health Insurance Portability and Accountability Act (HIPAA) Training Rin Coleridge, SFHSS Director of Enterprise Systems and Analytics  9/2024 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 (PBGH)</p>
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**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><i>Activity 7A.</i>  <i>Conduct a mental health vendor summit to support alignment around clear pathways to navigating mental health and emotional well-being resources and services.</i></p>	<p>Q1 2023</p>	<p><b>Status:</b> Completed  <b>Commentary:</b>  <b>2022:</b> SFHSS held an inaugural Mental Health Forum in December 2022 to discuss how to support alignment with clearer pathways to navigate 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.  <b>2024:</b> SFHSS released the 2022 Mental Health Forum Report embedded in the Director Report in 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. Currently working with graphic artist to finalize the digital journey map, set to be completed by 1/31/2025 and have re-engage Aon team to assist in driving key initiatives that address priorities identified as an outcome of the Mental Health forum.</p>
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<p><i>Activity 7B.</i> Recruit members among city departments to form an Employee Assistance Program (EAP) advisory group.</p>	<p>Q1 2025</p>	<p><b>Status:</b> Strategy Revised <b>Commentary:</b> <b>2023:</b> Forming an Citywide Employee Assistance Program advisory group has proven challenging due to staffing constraints. In lieu of a Citywide EAP group, a Public Safety EAP workgroup was initially established to explore the expansion EAP services to support the specific first responder population needs. The committee continues to meet monthly to evaluate the current program to ensure the services align with the needs of that population. <b>2024:</b> The Well-Being division hired one new Senior EAP Counselor in October 2024 to assist the current Sr. EAP Counselor in co-leading the advisory group. The Senior EAP Counselors provide organizational wellness services and engage in direct client counseling. These Sr EAP Counselors also conduct clinical assessments, short-term counseling, and referral of City and County employees experiencing difficulties related to personal or work-related problems. Expansion beyond the current advisory group will be explored in 2025.</p>
<p><i>Activity 7C.</i> 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> <b>May 2023:</b> Well-Being executed a Mental Health campaigns in May 2023 and May 2024 aimed at targeting Mental Health Stigma, the Connection Between Mental Health &amp; Physical Health, and Taking Action to Reach Out and Help Others. EAP data reports on participation and % change month to month for Trainings/Workshops, Webinars, Credible Mind Assessments, Credible Mind Sessions, and EAP Cases. In 2024, EAP achieved a 19.2% increase in engagement compared to prior year, exceeding the 5% increase goal by over 14%. <b>May 2024:</b> Well-Being executed on the annual Mental Health Awareness Campaign, which aimed to meet a 5% engagement increase in services/resources provided throughout the month and available ongoing, including Trainings/Workshops, Webinars, Credible Mind Assessments, Credible Mind Sessions, and EAP Cases. Highlights are accompanying the Strategic Plan Annual Progress slide deck presented in January 2025.</p>
<p><b>Business Initiative 8. Enhance programs to support early retiree and retiree well-being</b></p>		
<p><i>Activity 8A.</i> Identify evidence-based and best practice approaches to enhancing retiree well-being.</p>	<p>Q3 2024</p>	<p><b>Status:</b> Deferred <b>Commentary:</b> <b>2023:</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. <b>2024:</b> Results for the RFI and panel results are currently unders review and consideration. Ensure alignment of well-being and Behavioral Health services for the BSC MAPPO transition for retirees. Enhanced reporting is starting to become available on behavioral health data from the health plans.</p>
<p><b>Strategic Goal: Optimize Service</b></p>		
<p><b>Business Initiative 9. Enhance member education and support services</b></p>		
<p><i>Activity 9A.</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>	<p>Q2 2025</p>	<p><b>Status:</b> Work in progress <b>Commentary:</b> Survey results from the 2024 Member Satisfaction Survey have been collected and analyzed. Member satisfaction baseline has been established as follows: based on a score of satisfied or higher was found to be 58%, 20% neutral, 22% unsatisfied. Promoter score from the survey was 26%. The 2025 Member Satisfaction Survey will be issued in Q1 of 2025.</p>
<p><i>Activity 9B.</i> Improve the First Call Resolution rate by 2% year-over-year for calls placed to SFHSS Member Services.</p>	<p>Annually</p>	<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. First Contact Resolution (FCR) data has been collected and reviewed for 2023 (baseline) and 2024 plan years. FRC for 2023: 63%. FRC for 2024 62%</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>	<p>2023-2025</p>	<p><b>Status:</b> Work in progress (for the identification of the steps involved the SOP). Review and analysis completed. Documentation forthcoming. Add. outstanding elements.  <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>SOP Priorities Include:</b> New Hire Training Plan, Delta Dental Report, Process Documentation Review Checklist, Hetch Hetchy, DEVA Processing, DEVA Terminations, Training Plan, Salesforce Narration, Salesforce Mail Requests, Incomplete Enrollment Notices, Cisco Webex Warm Transfer, BAS Processing and Out of Sequence and Court Order  Additional SOPs will be added as they become identified, and priorities may shift.</p>
<p><i>Activity 10B.</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>	<p>Q4 2024</p>	<p><b>Status:</b> Strategy Revised  <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. This survey most meaningful for gauging preparedness among the Member Services Division specifically, because not all divisions interact with or have involvement in training and Open Enrollment processes. The 2024 survey was distributed to assess how well prepared Member Services staff felt based on the provided trainings. Analysis of the anonymous responses is currently underway to better allocate resources and improve the experience for our members and our staff for Plan Year 2025 Open Enrollment.</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>	<p>2023-2025</p>	<p><b>Status:</b> Work in progress  <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 Call Center qualify assurance (QA) metrics are developed. This measure looks at the customer service and qualify and accuracy of information shared with members. Outstanding QA measures include enrollment processing, reconciliation and discrepancy report processing.</p>
<p><i>Activity 11B.</i> Conduct formal Quality Improvement Reviews of Member Services functions.</p>	<p>2023-2025</p>	<p><b>Status:</b> Work in progress  <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. Call Center qualify assurance (QA) reviews started in Q3 with supervisors reviewing two calls per month for each of the staff in their units. Reviews were suspended in Q4 due to Open Enrollment and will restart again in Q1 of 2025. This is an ongoing process and will continue monthly.</p>