

SFHSS Strategic Plan 2027-2031 Framework

Health Service Board Meeting
September 10, 2026

Presenters:

Rey Guillen, *SFHSS Executive Director*

Rin Coleridge, *SFHSS Chief Operating and Experience Officer*

Teresa Tan, *SFHSS Chief Financial and Affordability Officer*

Agenda

- Timeline
- Purpose
- Mission, Vision, and Core Values
- 5 Pillars
- Next Steps
- Request for Feedback

Timeline

- **January–June 2026:** DHR facilitated workshops with all staff to develop framework for the next multi-year plan. Strengths, Weaknesses, Opportunities, and Threats (SWOT) were included.
- **July–August 2026:** Executive team refined the framework into 5 pillars
- **September 2026:** Health Service Board provides input on next plan
- **October–November 2026:** Develop Objectives and Key Results
- **December 2026:** SFHSS presents 2027-2031 Strategic Plan to Health Service Board for final approval

Purpose

SFHSS exists to create a thriving workforce during and after employment so San Francisco can grow, flourish, and be a world-class city.

Mission and Vision

- **Mission:**

- *To promote the health and well-being of our members and their dependents by offering them a suite of quality employee benefits and services.*

- **Vision:**

- *Healthier lives for every member.*

Core Values

- Compassion
- Integrity
- Adaptability
- Transparency

Pillar 1: Exceptional Member Experience (Member Experience)

High-Level definition:

- Deliver compassionate, empathetic, efficient, and transparent support with integrity to members. (Manner in which it is delivered, not the manner in which decisions made.)
- Offer benefits which meet the diverse needs of all our members
- Encompass everything, we do for member including
 - Plans, programs, and education

Possible specific initiatives:

- Increase and modernize communication channels
- Well-being specifics: assessment and where to grow next
- Build healthcare literacy of members

Pillar 2: Business Modernization and Workflow Efficiencies (Efficiency)

High-Level definition:

- Automate key administrative workflows, improve training and documentation, and implement robust quality assurance frameworks
- Strengthen procurement processes
- Advance Technology and System Reliability

Possible specific initiatives:

- Regularly assess and mitigate risks related to healthcare trends, vendor contracts, regulatory changes, and market volatility through scenario planning and strategic adjustments
- Optimize PeopleSoft and Salesforce platforms, and leverage AI assistance
- Formalize pre-procurement planning and strategy, enforce performance guarantees and service-level agreements, and improve contract controls to ensure transparency, compliance, and effective vendor oversight

Pillar 3: Financial Resilience and Compliance Readiness (Financials and Compliance)

High-Level definition

- Build reserves and contingency plans to withstand economic downturns, unexpected healthcare cost increases, and funding uncertainties
- Identify and pursue opportunities for cost savings and funding mechanisms, including pharmacy strategies and high-value plan, network and purchasing approaches
- Proactively integrate upcoming compliance requirements into core business operations
- Optimize financial resource allocation

Possible specific initiatives:

- DEVA funding – identify strategy for funding eligibility audits
- Redefine the index for increasing the sustainability fee
- 10-county calculations- evaluate employee and employer cost share
- Create an audit tracker
- Expand the adoption of ACO plans

Pillar 4: Build Public (City) Awareness of Core Functions (Relationship Building)

High-Level definition:

- Building awareness of the department's function/mission and what it takes to deliver on that mission
- Cross-department collaboration
- Enhance department visibility

Possible specific initiatives:

- Rename department website
- Evaluate department name
- Establish relationships with strategic supporters and partners

Pillar 5: Cultivate a Thriving Workforce (Thriving Workforce)

High-Level definition:

- Promote staff recognition and appreciation, acknowledge contributions
- Encourage collaboration, learning, and well-being via team-building activities, cross-role shadowing, and mental health check-ins
- Support open communication and transparency, ensuring every voice is heard

Possible strategic initiatives:

- Implement department mentoring program
- Regular celebrations, awards, and peer-nominated honors
- Provide accurate and fair assessment of performance and offer opportunities for training to prepare people for career advancement

Next Steps:

- Request any feedback from the Health Service today
 - Possible special meeting for HSB to consider more input
- Leadership team incorporate and edits/additions/clarifications
- Develop Objectives and Key Results (OKRs) with managers
- Share complete plan with all staff
- Present final plan to HSB in December

Board Discussion