



2023-2025 
STRATEGIC PLAN REPORT



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

January 11, 2024

Presented by:

Leticia Harris, Senior Health Program Planner

Iftikhar Hussain, Chief Financial Officer

Carrie Beshears, Well-Being Manager

Rey Guillen, Chief Operating Officer

Agenda

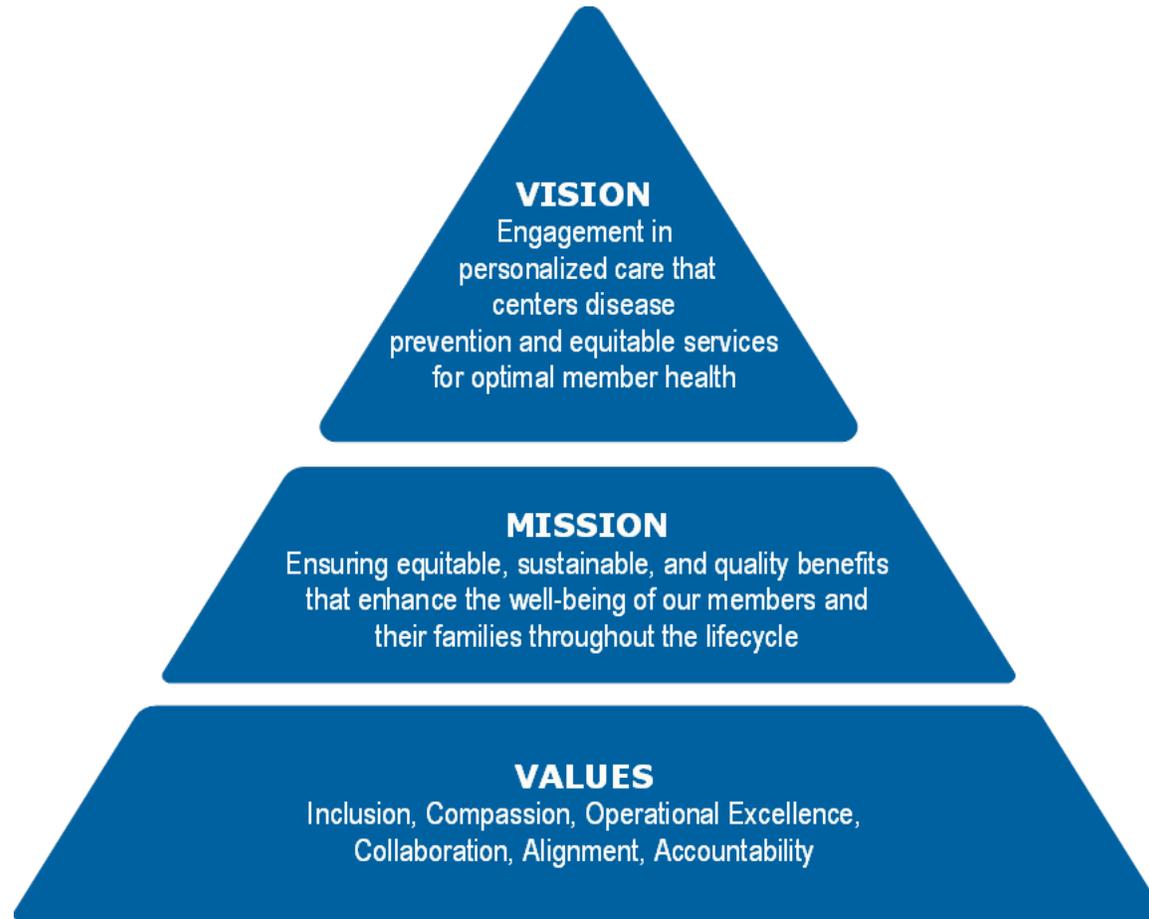
- *Strategic Planning Framework Overview*
- *Lead with Equity Approach*
- *Overview of Annual Progress per Goal Area*
- *Lessons Learned: Strategy Execution for The Road Ahead*

Presentation Aim

- *Reporting on a subset of active 2023 goal areas only, not initiatives that have just begun in Jan 2024 or those that have yet to begin in 2025*
- *Seek ongoing collaborative input to support strategy implementation*

Strategic Plan

Framework Overview



STRATEGIC GOALS



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



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



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



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.



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

- 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



Office of Racial Equity Peer Learning Cohorts (PLC)

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

Pipelines Cohort

Sharing and reflecting on practices departments have tried around equitable entry points into their departments (e.g. recruitment, internships, interviews, job descriptions, etc.)

Pathways Cohort

Sharing and reflecting on practices departments have tried around equitable professional development, mentorship, pathways for employee mobility, etc.

Culture Cohort

Sharing and reflecting on practices departments have tried around creating belonging and safety, such as supporting affinity spaces, engaging staff, receiving employee feedback, etc.

Justice Cohort

Sharing and reflecting on practices around belonging and understanding, specifically for law enforcement and justice departments

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



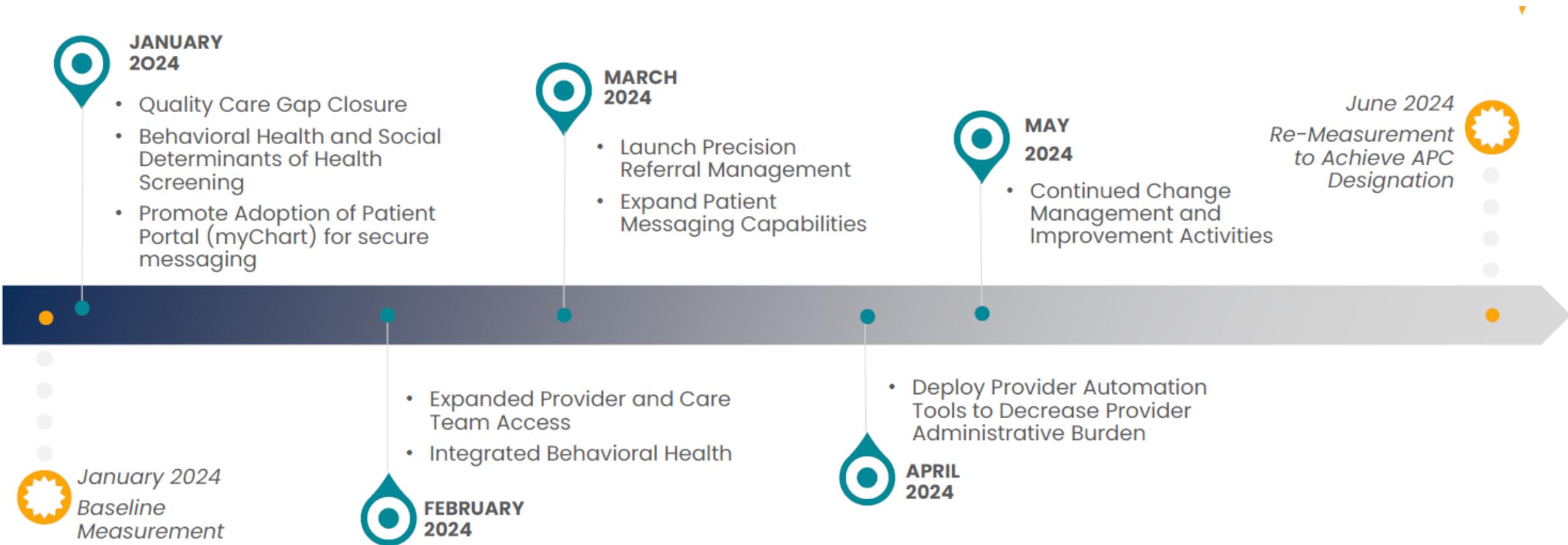
Fundamentals of Equitable Employee Development



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.



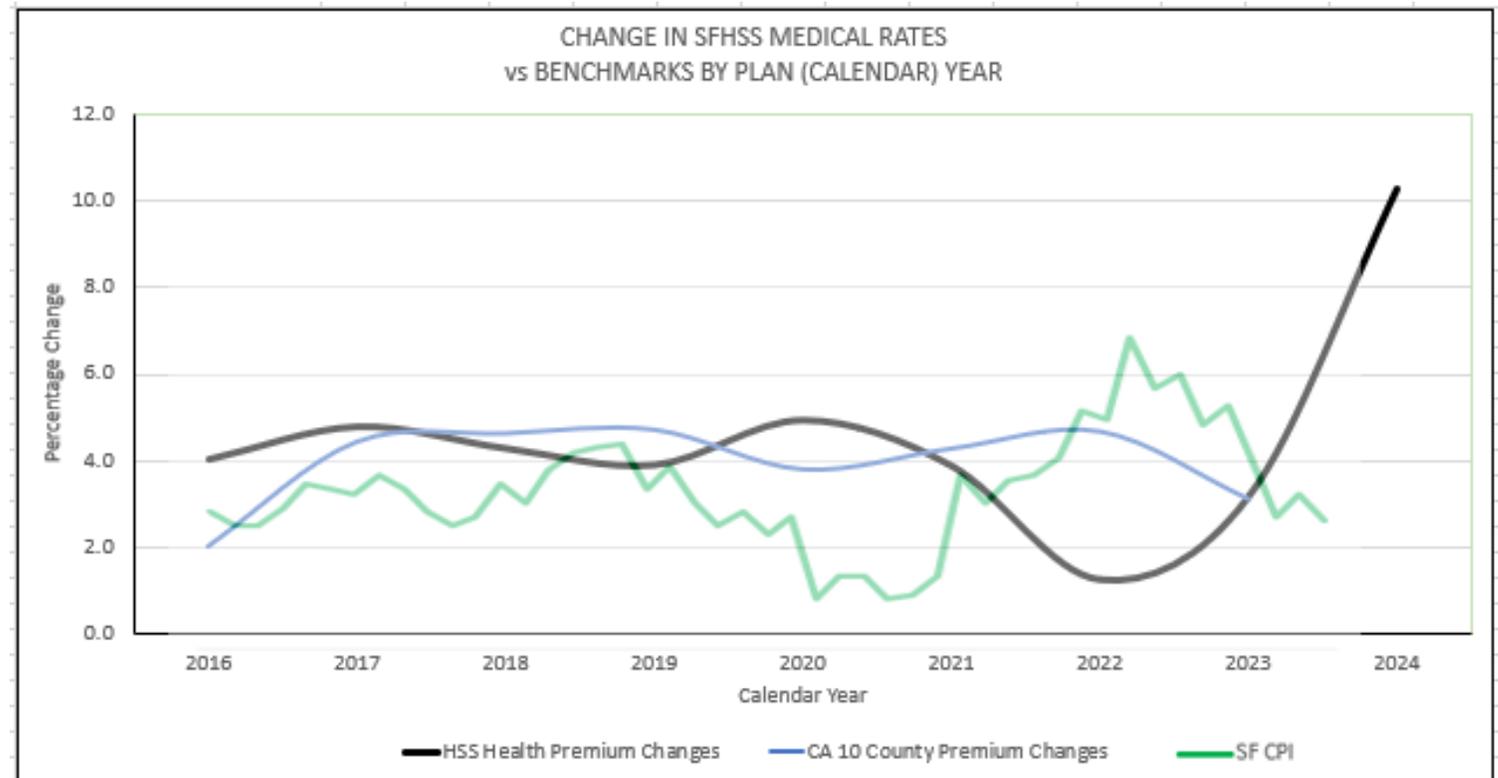


Goal 3: Provide **affordable and sustainable** healthcare and high-quality well-being services through value-driven decisions and program design.

Affordability and Sustainability

SFHSS Cost vs. Benchmarks

- Healthcare costs have high variability and historically outpace inflation
- Average SFHSS' rate increases are lower than local and national trends during the past five years
- The rates for plan year 2024 were high due to lagging impact of rising inflation 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.
- SFHSS is tuning into the California Office of Health Care Affordability's (OHCA) Board
- Also providing education on the role of the Health Service Board





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.

Inaugural Mental Health Vendor Summit



HIGHLIGHTS



Preparation

- ✓ Created six personas to represent the diverse membership within SFHSS, with a range of mental health and well-being needs
- ✓ Invited health plan account managers, thought leaders, and clinicians as well as external vendors, key department heads, and SFHSS leadership



Forum

- ✓ Recognized current state of mental health and well-being benefits and resources
- ✓ Engaged fifty attendees in a journey mapping exercise using the personas
- ✓ Facilitated large group sharing
- ✓ Named opportunities and solutions based on identified gaps



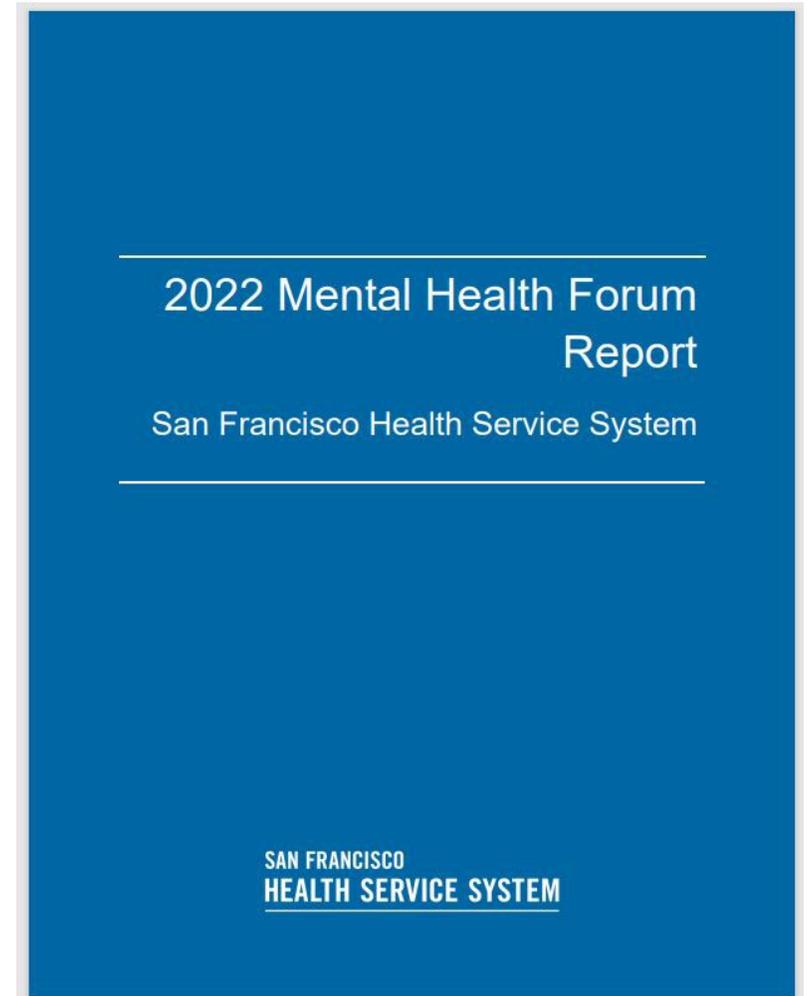
Post-Forum

- ✓ Analyzed completed journey maps to identify common themes, forming initial recommendations
- ✓ Meeting with internal departments and vendors to form recommendations into actionable steps

Director's Report Feature: Mental Health Forum Report

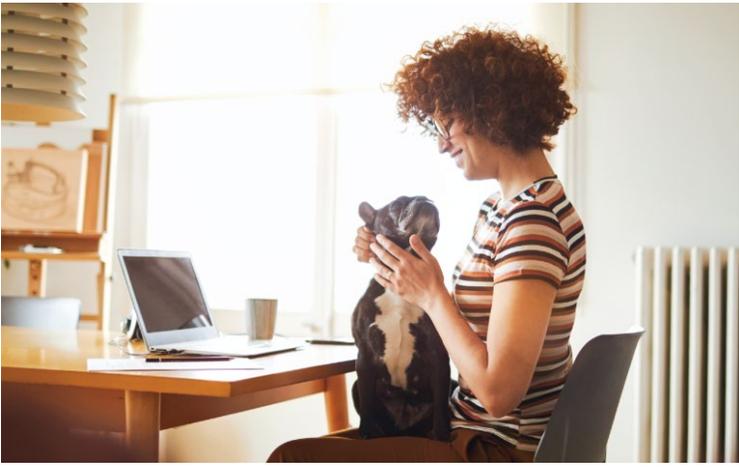
While the forum results and recommendations will not fix gaps in the mental health care delivery system, they will serve as a catalyst to continue building out efforts identified in the strategic plan. They also equip SFHSS and their partners with the lens to think holistically and with an upstream approach when addressing mental health. Read more about the Mental Health Forum:

- Approach & Design
- Mapping the Ecosystem
- Analysis & Findings
- Key Themes & Recommendations



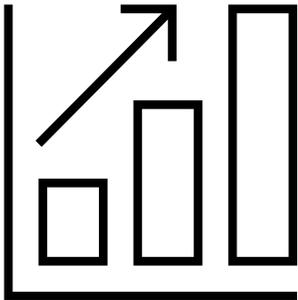
Well-Being Annual Mental Health Campaign

to increase utilization of mental health and substance use disorder resources and services



HIGHLIGHTS

GOAL: 5% increase in utilization from prior year



ACHIEVED:
19.2% increase
in utilization from
prior year

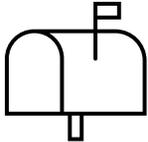


First ever Mental Health webinar in partnership with the Health Plans

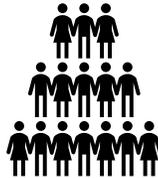
Well-Being Key Player **training** that focused on supporting employee mental health



13.5% increase in the number of CredibleMind sessions from prior year (session = individual accessing the website)



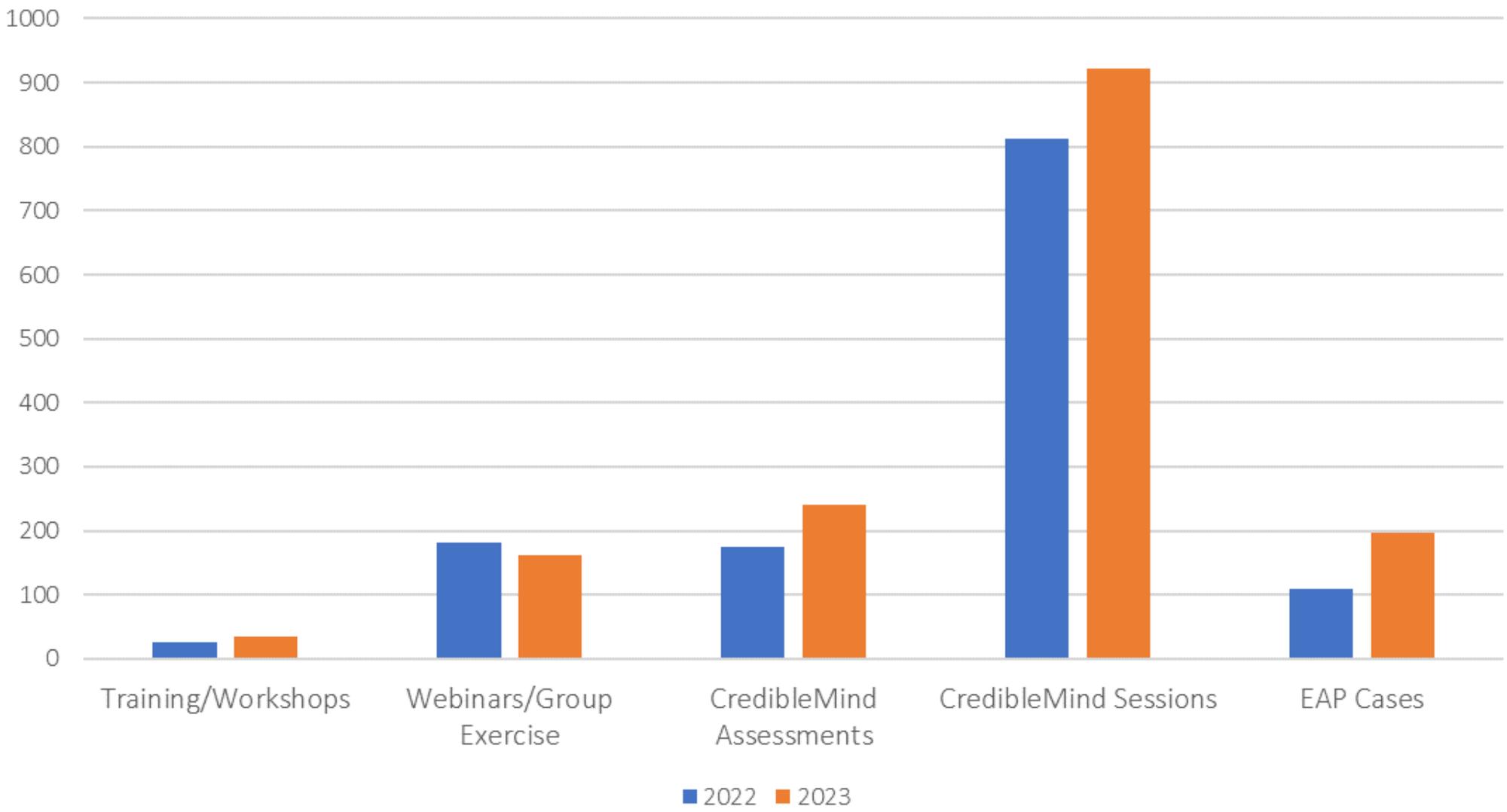
Distributed over **6,100** coasters to 24 departments



Offered 9 Webinars and 18 group exercise classes with a **274-participation rate**

Well-Being Annual Mental Health Campaign

Mental Health Awareness Month Participation - Year over Year



Enhancing Retiree Well-Being

Below are SFHSS initiatives and developments related to identifying evidence-based and best practice approaches to enhancing Retiree Well-Being



✓ Gathered a panel of retirees and SFHSS employees

- **Panelist**

- 56% ranged between 70-79 years old
- 40% are retired < 5 years and 33% have been retired between 11 – 15 years
- 13 departments represented

- **Top 3 Ranked Topics of Interest:**

1. Mental Health
2. Exercise & Nutrition
3. Health Care (preventive care, chronic conditions, medication management, etc.)

- Attended vendor demonstrations in response to an RFI for a healthy aging program

✓ Facilitated focus groups with panelist to obtain feedback on vendor programs and learn what type of program or support services are desirable for our retiree population.

✓ Analyzed feedback from panel and currently in review from SFHSS



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

Improvements to Staff Training and Professional Development



Our goals focus on aligning customer service strategies through improved staff training and consistent customer experience. Critical components include standardized customer service training, quality improvement reviews, and performance-based measurement approaches to eliminate inefficient systems and automate processes as much as possible.

To support this goal, we've begun the development of Standard Operating Procedures (SOP) for the Member Services division.

Progress

- 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.
- Project plan has been developed for the tracking of SOP documentation and related activities.



Problem Solving Process

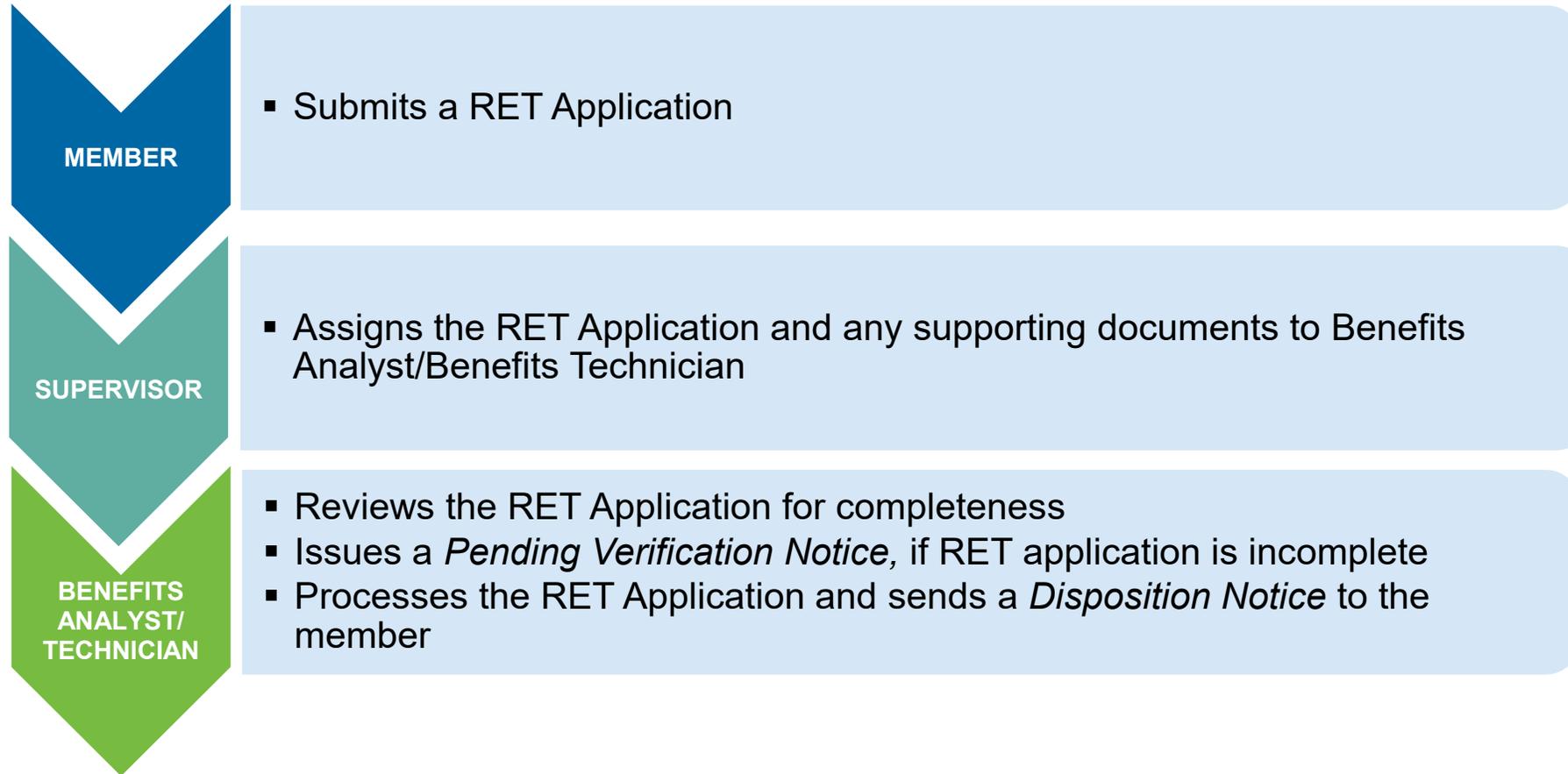


Each Standard Operation Process includes:

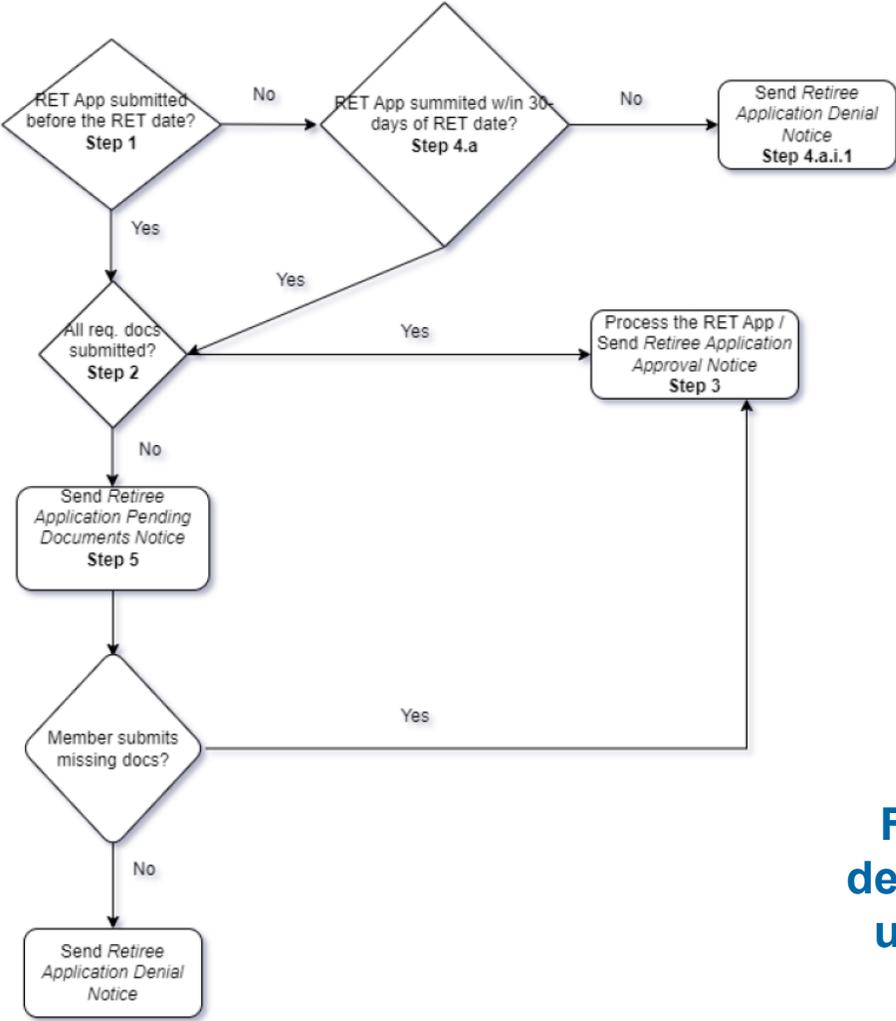
- Assessment and gap analysis
- Member noticing of case disposition
- Documentation framework
- Stakeholders review for feedback
- Piloting with continuous improvement
- Staff training and expectation setting
- Full scale implementation
- Measurable outcomes
- Quality Assurance metrics

[This Photo](#) by Unknown Author is licensed under [CC BY-SA](#)

New Retiree Application Standard Operating Procedure (SOP): Complete



Retiree Application Step-by-Step Workflow



Front line staff have a hand in designing step-by-step solutions using the voice of the member

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 preliminary year of 2023-2025 Strategic Plan implementation:

