



# 2017 – 2020 Strategic Plan: Draft Objectives, Success Measures and Strategies

May 8, 2017

Ross Weiler, Principal  
Day | Health | Strategies

# Agenda

- I. Project Overview/Timeline
- II. Recap of 2017 – 2020 Goals
- III. Progress to Date
- IV. Draft Objectives and Success Measures
- V. Next Steps

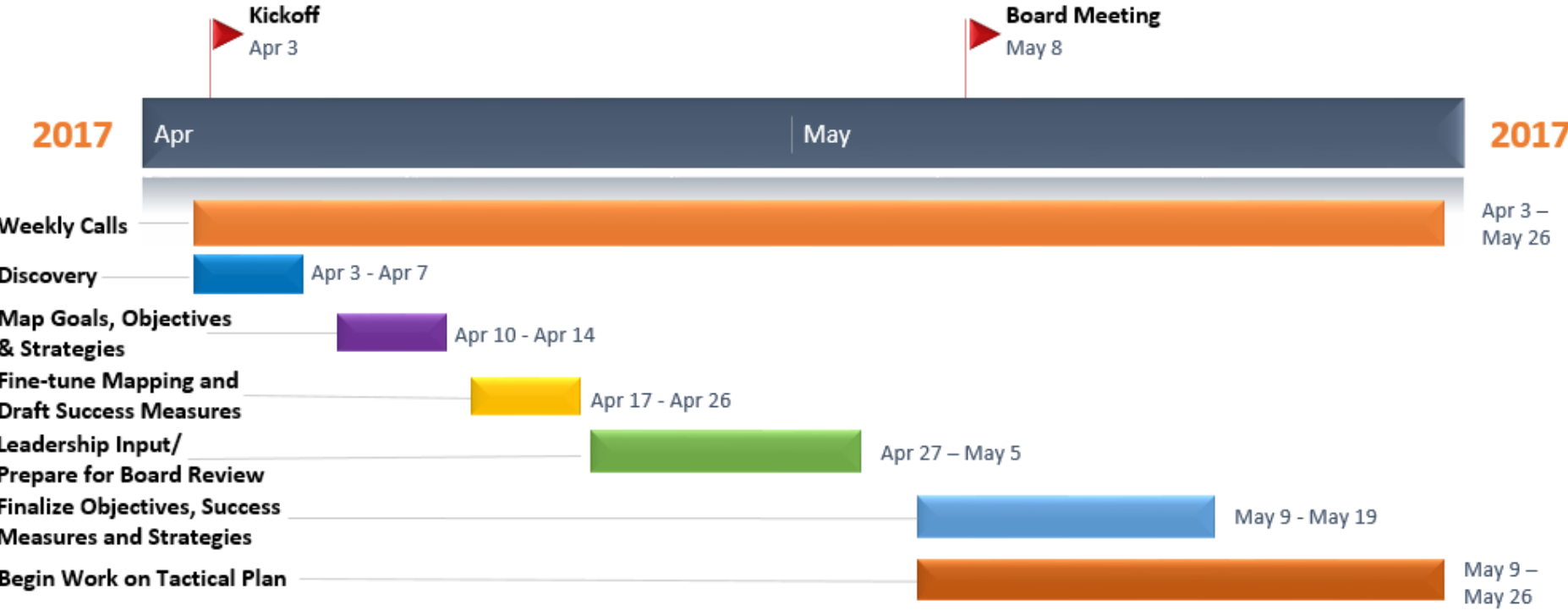
Appendix:

Draft Strategies

# Project Overview

- Finalize objectives and develop success measures and strategies for each of Connect for Health Colorado's 2017 – 2020 goals
- Develop a tactical plan to enable effective and timely execution
- Establish a tracking method and dashboard to help the Marketplace monitor progress and take appropriate action should adjustments be needed
- Review progress and results; obtain input:
  - select Board Committees
  - Board Advisory Group
  - Board of Directors
- Develop Strategic and Tactical Plans

# Project Timeline



- A draft written Strategic Plan will be shared with the Board on 6/12, with public comment in June and a final vote at the 7/10 Board meeting.
- An accompanying internal Tactical Plan, including an action plan with strategies, tactics, metrics and a timeline supporting each objective, will be finalized by the end of July.

# 2017 – 2020 Goals

1. Advocate to improve access to coverage in rural areas of Colorado.
2. Maximize the number of consumers and employers who shop and enroll through the health insurance marketplace, and apply for available financial assistance.
3. Improve the ability of customers to attain and retain the right coverage for their needs.
4. Ensure that Connect for Health Colorado is a healthy and thriving organization.

# Progress to Date

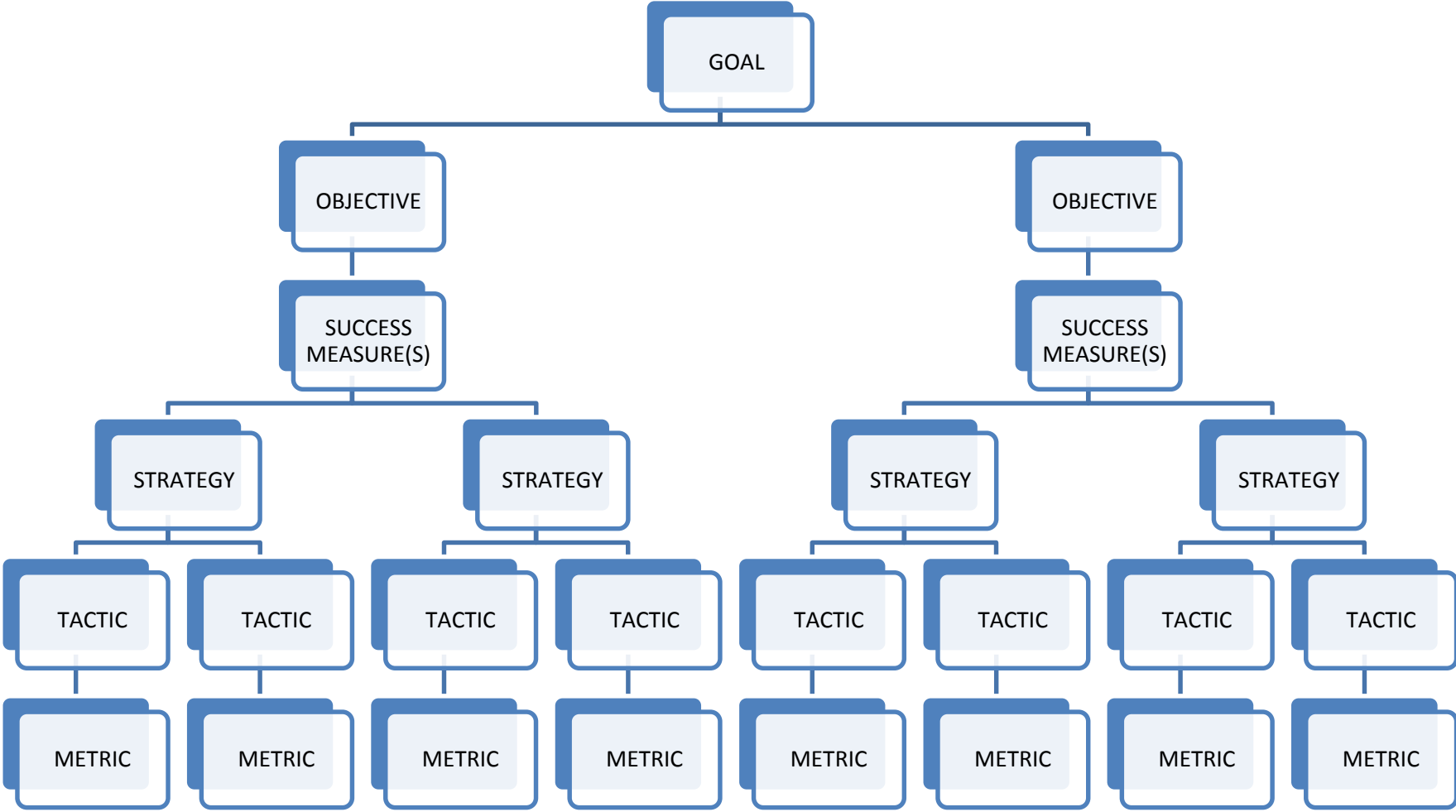
- Synthesized prior strategic planning activities and ideas
- Reviewed external forces and reviewing internal constraints influencing and potentially impacting the Marketplace's ability to meet its strategic goals
  - External forces: potential threats and opportunities
  - Internal constraints: key strengths and potential weaknesses
- Drafted a high level strategy map linking goals to objectives and potential strategies
  - Objective: what will be achieved
  - Strategy: how it will be achieved
- Established cross-functional teams to finalize proposed objectives for each goal, as well as success measures and strategies for each objective

Result = alignment between and clarity of goals, objectives and strategies

# Strategy Mapping



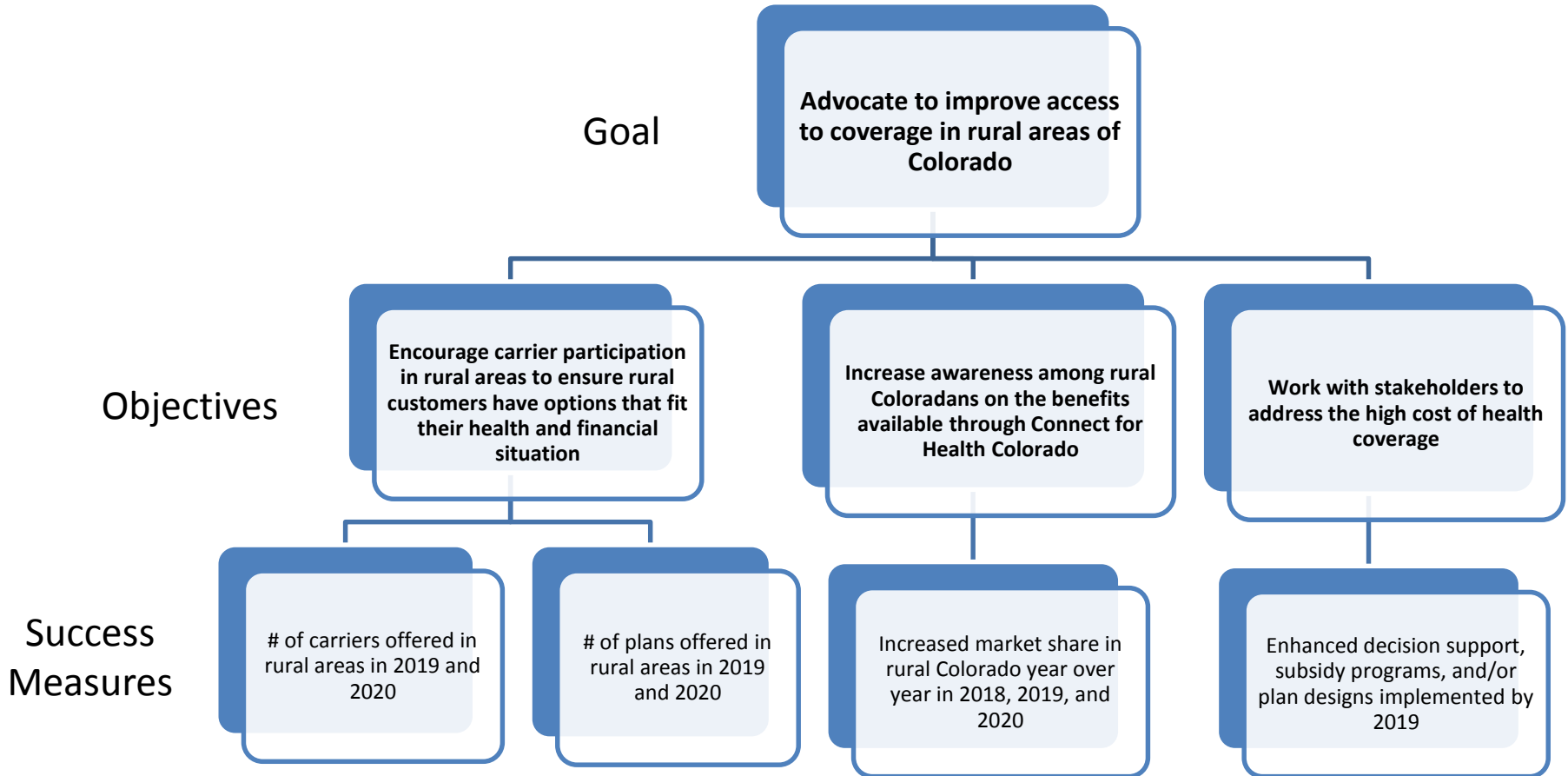
# Strategy Execution (aligning Strategic and Tactical Plans)





# Strategy Mapping: Goal #1

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See the Appendix for draft strategies

# Strategy Mapping: Goal #2

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Goal

Maximize the number of consumers and employers who shop and enroll through the health insurance marketplace, and apply for available financial assistance

Objectives

Increase enrollment overall

Increase customer satisfaction

Success Measures

Increase new customer enrollment by 10% annually beginning with OE 2018

Retain 75% of customers annually beginning with OE 2018

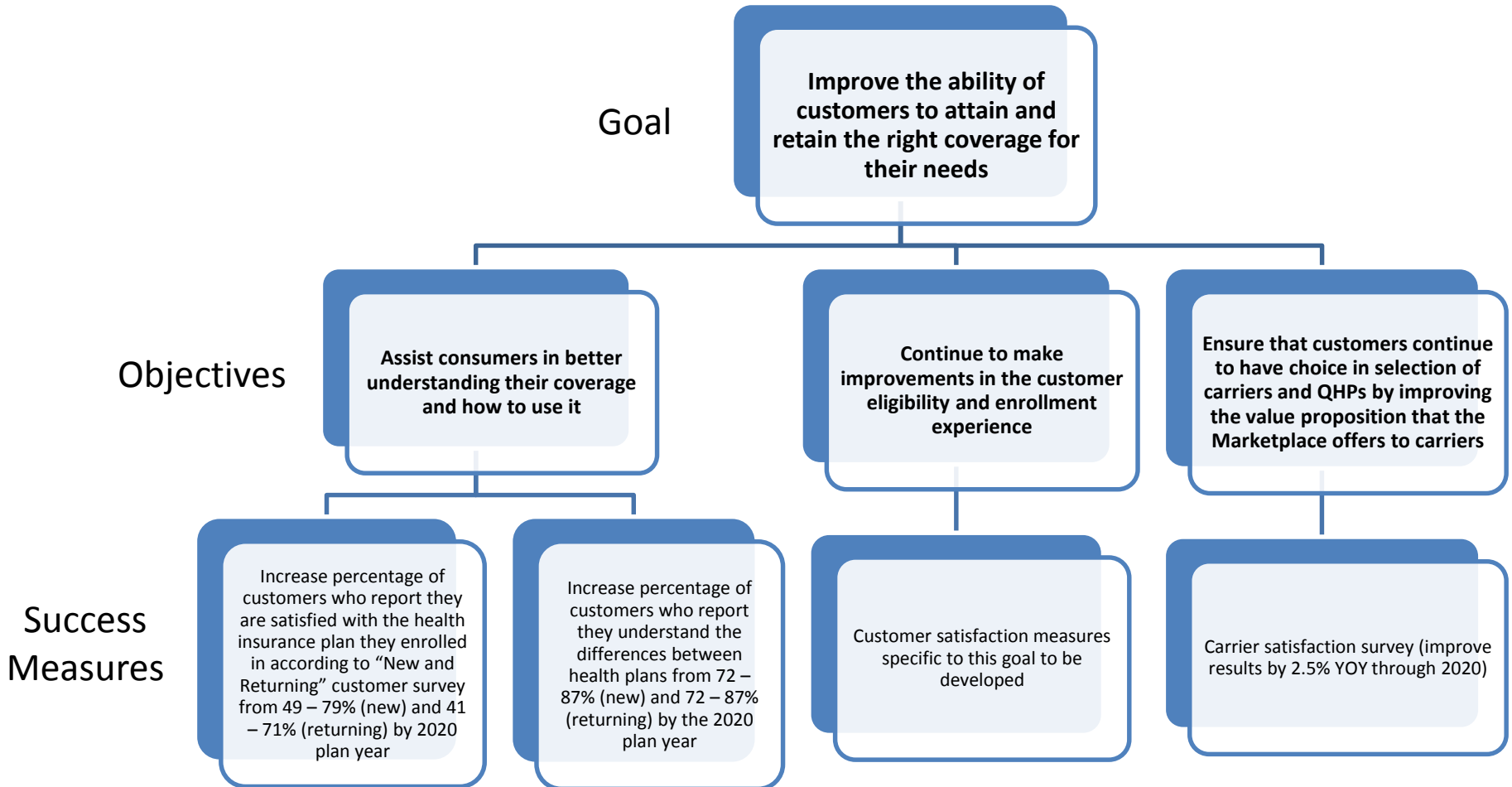
Increase customer satisfaction from 53% to 80% by 2020. (70% by 2019 and 80% by 2020)

Satisfaction measures for partners and stakeholders TBD

See the Appendix for draft strategies

# Strategy Mapping: Goal #3

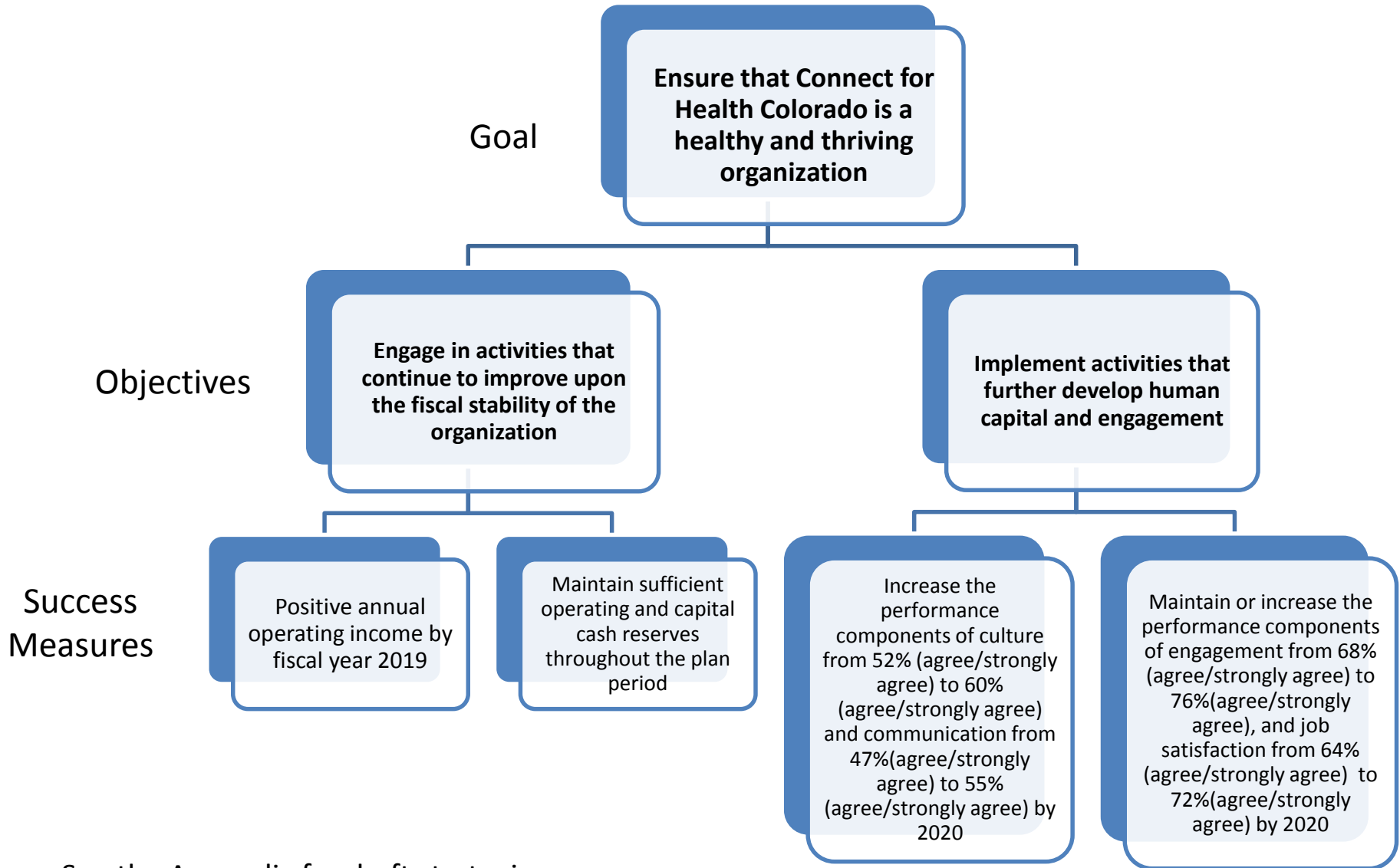
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See the Appendix for draft strategies

# Strategy Mapping: Goal #4

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See the Appendix for draft strategies

# Next Steps

1. Obtain Board input and finalize objectives, success measures and strategies
2. A written strategic plan will be shared with the Board on June 12<sup>th</sup>, with public comment in June; and a final Board vote will be set for the July 10<sup>th</sup> meeting
3. By the end of July, Connect for Health Colorado will develop a tactical plan that ties to the 2017-2018 budget, and a management dashboard to ensure timely and effective strategic plan execution

# Appendix: Draft Strategies

# Draft Strategies: Goal #1

Advocate to improve access to coverage in rural areas of Colorado.

OBJECTIVES/SUCCESS MEASURES	STRATEGIES
<p><b>Objective #1: Encourage carrier participation in rural areas to ensure rural customers have options that fit their health and financial situation.</b>  <b>Success Measures:</b>  <b># of carriers and number of plans offered in rural areas in 2019 and 2020.</b></p>	<ol style="list-style-type: none"> <li>1. Explore ways to reduce risk for carriers in rural areas (e.g. statewide reinsurance)</li> <li>2. Explore ways to utilize cross-state provider networks</li> <li>3. Explore additional flexibility in the plan designs that carriers can offer in rural areas</li> </ol>
<p><b>Objective #2: Increase awareness among rural Coloradans on the benefits available through Connect for Health Colorado.</b>  <b>Success Measure:</b>  <b>Increased market share in rural Colorado year over year in 2018, 2019, and 2020.</b></p>	<ol style="list-style-type: none"> <li>1. Focus on rural outreach and enrollment</li> <li>2. Build relationships with community influencers, brokers, carriers, health coverage guides in rural areas to keep Connect for Health Colorado top-of-mind as rural customers look for health insurance solutions</li> <li>3. Increase resources to target high eligible but not enrolled (EBNE) rural areas</li> </ol>
<p><b>Objective #3: Work with stakeholders to address the high cost of health coverage.</b>  <b>Success Measure:</b>  <b>Enhanced decision support, subsidy programs, and/or plan designs implemented by 2019.</b></p>	<ol style="list-style-type: none"> <li>1. Increase health insurance literacy and enhance decision support tools specifically targeted at rural Coloradans</li> <li>2. Support potential initiatives to mitigate the cost of insurance, such as state-level subsidies for above 400% FPL</li> <li>3. Explore potential alternative plan design offerings that may have lower premiums to increase consumer choice</li> </ol>

# Draft Strategies: Goal #2

Maximize the number of consumers and employers who shop and enroll through the health insurance marketplace, and apply for available financial assistance.

OBJECTIVES/SUCCESS MEASURE(S)	STRATEGIES
<p><b>Objective #1: Increase enrollment overall</b></p> <p><b>Success Measures:</b></p> <ul style="list-style-type: none"> <li>• Increase new customer enrollment by 10% annually beginning with OE 2018.</li> <li>• Retain 75% of customers annually beginning with OE 2018.</li> </ul>	<ol style="list-style-type: none"> <li>1. Identify, coordinate and effectively utilize available data sources to improve retention and enroll new customers in health coverage</li> <li>2. Continue/refine existing and develop new outreach and education mechanisms to target subsidy eligible consumers, non-subsidy eligible consumers and small businesses</li> <li>3. Explore feasible alternative product (“ancillary”)/benefit solutions available to all new and existing customers</li> <li>4. Expand organizational scope to encourage marketplace utilization by other states (e.g. regional exchange) or entities (e.g. public employers or carriers)</li> <li>5. Explore partnerships with established healthcare and wellness organizations that Connect for Health Colorado can align with to attract more/potential customers</li> </ol>
<p><b>Objective #2: Increase customer satisfaction</b></p> <p><b>Success Measures:</b></p> <ul style="list-style-type: none"> <li>• Increase customer satisfaction from 53 to 80 by 2020.</li> <li>• Satisfaction measures for partners and stakeholders TBD.</li> </ul>	<ol style="list-style-type: none"> <li>1. Explore improvements in the SC structure and processes to improve the customer experience</li> <li>2. Assess, define and implement system functionality improvements both internally and externally</li> <li>3. Broaden customer satisfaction surveys to include partners and stakeholders (brokers, assisters, carriers)</li> </ol>



# Draft Strategies: Goal #3

Improve the ability of customers to attain and retain the right coverage for their needs.

OBJECTIVES/SUCCESS MEASURE(S)	STRATEGIES
<p><b>Objective #1: Assist consumers in better understanding their coverage and how to use it; from plan selection, enrollment, and throughout the plan year.</b></p> <p><b>Success Measures:</b></p> <ul style="list-style-type: none"><li><b>Increase percentage of customers who report they are satisfied with the health insurance plan they enrolled in according to the “New and Returning” customer survey.</b><ul style="list-style-type: none"><li>2017/2018 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New Customers: 49% to 59%</li><li>Returning Customers: 41% to 51%</li></ul></li><li>2018/2019 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New: 59% to 69%</li><li>Returning: 51% to 61%</li></ul></li><li>2019/2020 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New: 69% to 79%</li><li>Returning: 61% to 71%</li></ul></li></ul></li><li><b>Increase percentage of customers who report they understand the differences between health plans.</b><ul style="list-style-type: none"><li>2017/2018 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New: 72% to 77%</li><li>Returning: 72% to 77%</li></ul></li><li>2018/2019 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New: 77% to 82%</li><li>Returning 77% to 82 %</li></ul></li><li>2019/2020 Plan Year YOY Comparisons<ul style="list-style-type: none"><li>New: 82% to 87%</li><li>Returning: 82% to 87%</li></ul></li></ul></li></ul>	<ol style="list-style-type: none"><li>Increase health insurance literacy throughout the plan year</li><li>Enhance online decision support tools to enable consumers to better understand their options and make the right plan selection based on their needs and circumstances</li><li>Broaden communication channels focused on total “cost of coverage”, “plan selection”, and the benefits of plans offering cost share reductions (CSR)</li></ol>

# Draft Strategies: Goal #3 (cont.)

Improve the ability of customers to attain and retain the right coverage for their needs.

OBJECTIVES/SUCCESS MEASURE(S)	STRATEGIES
<p><b>Objective #2: Continue to make improvements in the customer eligibility and enrollment experience.</b>  <b>Success Measure:</b></p> <ul style="list-style-type: none"> <li>Customer satisfaction measures specific to this goal to be developed.</li> </ul>	<ol style="list-style-type: none"> <li>Pursue a collaborative approach with State and Federal entities to develop a streamlined process for members to move from State to Exchange or Exchange to Federal programs</li> <li>Increase stakeholder, customer service representative, and member awareness of appeals process, policy guidelines, and available resolution pathways</li> <li>Increase customer utilization of knowledgeable assistors to include certified Brokers, Assistance Sites, and other knowledgeable assistors</li> </ol>
<p><b>Objective #3: Ensure that customers continue to have choice in selection of carriers and QHPs by improving the value proposition that the Marketplace offers to carriers.</b>  <b>Success Measure:</b></p> <ul style="list-style-type: none"> <li>Carrier satisfaction survey (improve results by 2.5% YOY through 2020).</li> </ul>	<ol style="list-style-type: none"> <li>Improve Marketplace enrollment processing</li> <li>Develop seamless SEP approval and verification process to promote timely reporting and reduce the potential for adverse selection</li> <li>Enhance and improve member initiated change reporting</li> <li>Explore additional ways for the Marketplace and carriers to work together to decrease carriers' cost of doing business, reduce carriers' administrative burden, and improve member retention and growth</li> </ol>

# Draft Strategies: Goal #4

Ensure that Connect for Health Colorado is a healthy and thriving organization.

OBJECTIVES/SUCCESS MEASURE(S)	STRATEGIES
<p><b>Objective #1: Engage in activities that continue to improve upon the fiscal stability of the organization.</b></p> <p><b>Success Measures:</b></p> <ul style="list-style-type: none"> <li>• Positive annual operating income by fiscal year 2019.</li> <li>• Maintain sufficient operating and capital cash reserves throughout the plan period.</li> </ul>	<ol style="list-style-type: none"> <li>1. Establish cash reserve policy and funding mechanisms</li> <li>2. Explore and implement, if appropriate, relevant alternative public/private funding, partnership and reimbursement mechanisms that contribute to sustainability</li> <li>3. Establish financial analysis discipline to evaluate the sustainability impact of new business opportunities, public policy initiatives and project/technology investments</li> <li>4. Implement and maintain financial management best practices in the areas of budgeting, management reporting and cost control</li> <li>5. Operationalize continuous improvement process across the organization</li> </ol>
<p><b>Objective #2: Implement activities that further develop human capital and engagement.</b></p> <p><b>Success Measures:</b></p> <ul style="list-style-type: none"> <li>• Increase the performance components of culture from 52% (agree/strongly agree) to 60% (agree/strongly agree) and communication from 47%(agree/strongly agree) to 55% (agree/strongly agree) by 2020.</li> <li>• Maintain or increase the performance components of engagement from 68% (agree/strongly agree) to 76%(agree/strongly agree), and job satisfaction from 64% (agree/strongly agree) to 72%(agree/strongly agree) by 2020.</li> </ul>	<ol style="list-style-type: none"> <li>1. Evaluate and deploy a staffing strategy that attracts and retains qualified talent</li> <li>2. Evaluate and deploy talent management initiatives that support and encourage employee professional growth and workplace engagement</li> <li>3. Establish a process to leverage the annual employee survey to develop actionable strategies along established performance components (benefits, communication, engagement , job satisfaction and culture)</li> <li>4. Evaluate and take steps to align workplace processes and practices with the 8 values relevant to being an ‘employer of choice’ (Flexible Deployment, Customer Focus, Performance Focus, Project-based work, Human Spirit and work, commitment, Learning and Development, Open information)</li> <li>5. Evaluate and take steps to further establish a “cadence “that can be added to our cultural norm that provides for suitability around innovation, fun and community within our organization</li> </ol>