

California Health Benefit Exchange Stakeholder Engagement Plan

Summary

The California Health Benefit Exchange strives to assure that it effectively engages a broad range of stakeholders to inform its policy development and shape the implementation of the Exchange. In April 2012, the Exchange released a “Stakeholder Engagement Options” [Discussion Brief](#) providing a summary of the major engagement vehicles used by the Exchange and three options for modifying the ongoing stakeholder engagement process. Based on initial Board and stakeholder feedback, Exchange staff have further developed the option of convening topic specific advisory groups beginning in 2013 and continuing current stakeholder engagement activities on an ongoing basis. This Recommendation Brief outlines the full set of activities that staff recommend comprise the Exchange stakeholder engagement plan.

Background

The Board of the Exchange has identified as among its core operating values its commitment to be guided in its work by working in partnership with the full range of stakeholders and earning the public’s trust by being transparent and accountable in how it operates. Stakeholder engagement serves several distinct goals including (1) gathering general and topic-specific input on policy issues, (2) building and sustaining partnerships, (3) fostering better understanding of the Exchange, and (4) understanding how Exchange policies impact stakeholder partners. The Exchange has sought to reflect these values and goals by regularly engaging stakeholders through a variety of activities described below.

The Exchange Blueprint certification process provides an opportunity to refresh our stakeholder engagement strategy and consider expanding upon our current activities. Through the Blueprint process, states will submit stakeholder engagement plans that describe how the state will consult with consumers, small businesses, State Medicaid and CHIP agencies, agents/brokers, employer organizations, and other relevant stakeholders. The stakeholder engagement activities recommended below meet the goals and values of the Exchange Board as well as the requirements for federal Blueprint certification.

CURRENT EXCHANGE ENGAGEMENT PROCESSES

Described below are the Exchange’s current stakeholder engagement activities.

Board meetings and ongoing communication activities

- Public Board meetings: Stakeholders actively participate in monthly public board meetings and have an opportunity to comment on each agenda item. All Board meetings are webcast with opportunities for phone participants to ask questions or make comments.

- Panel presentations: The Exchange invites stakeholders to make presentations to the Board on policy issues under consideration. Recent stakeholder presentations have focused on health plan contracting, the Small Employer Health Options Program (SHOP) and strategies to maximize enrollment in health programs.
- Sharing reports and comment letters: Exchange staff share stakeholder comment letters and reports with the Board in advance of Board meetings whenever possible. Letters and reports are also posted on the Exchange website.
- Exchange email distribution list: The Exchange regularly shares program updates with stakeholders through an email distribution list that includes more than 2,500 individuals. Stakeholders can subscribe to the distribution list through a link on the Exchange homepage: www.hbex.ca.gov.
- Tribal consultation: The Exchange held its first formal consultation with California's Tribes on July 6, 2012, and will implement an ongoing Tribal consultation policy which will include the establishment of a Tribal advisory group.
- One-on-one stakeholder meetings and presentations: Exchange staff and Board members hold meetings with individual stakeholder groups and make presentations at stakeholder conferences and webinars.

Workgroups and topic-specific input

- Individual and Small Business Workgroups: Workgroups were originally convened in July 2011 to advise the Exchange, DHCS and MRMIB on eligibility and enrollment issues. Membership includes consumer advocates, providers, health plans, counties, labor, brokers and small businesses. Recently the Exchange has used these groups to advise the Exchange on health plan contracting and SHOP issues and to help develop stakeholder questions on outreach and enrollment and qualified health plan issues.
- Ad hoc statewide meetings: The Exchange convened meetings around the state on outreach and enrollment and qualified health plan issues. Sessions were held with consumer advocates, providers, brokers and business representatives. Discussion topics were drawn from a list of questions developed in consultation with the individual and small business workgroups. Summary reports on these sessions are available on the Exchange website (see [marketing](#) and [health plan](#) policies) and were shared with staff and contractors to inform policy and strategy development in these areas.
- Topic-specific written stakeholder input: The Exchange regularly posts topic-specific questions on the Exchange website for written comment. Comments are subsequently shared with the Board and posted on the website. Exchange staff document changes made to policy recommendations based on stakeholder feedback prior to requesting Board action on the topic. Recent requests for written feedback have included health plan contracting policy recommendations; outreach, marketing and assistance strategies; service center principles and models; and SHOP policy recommendations. (For an example, see consolidated qualified health plan [stakeholder comments](#) and [summary of changes](#) made to preliminary policy recommendations.)

- Topic-specific webinars: Exchange staff regularly host webinars on priority policy issues that are under consideration by the Board. The Exchange uses its stakeholder distribution list to invite a broad audience, and Board members frequently participate in webinars. Recent webinar topics have included qualified health plan contracting issues; outreach, marketing and assistance strategies; and service center principles and models.

Recommendation for Future Stakeholder Engagement

Staff recommends that the Exchange continue with current stakeholder engagement activities through 2012. Beginning in 2013, the Exchange would revise its current advisory group structure (disbanding the two standing advisory groups) to create three advisory groups. All other stakeholder engagement activities would continue in 2013 and beyond.

Advisory groups will be convened on the following topics: (1) plan management, (2) marketing, outreach and assistance, and (3) the SHOP. The Exchange is particularly interested in consultation on these issues to continually refine our policies and strategies to ensure the Exchange offers high quality and affordable health plans, maximizes enrollment of eligible individuals in coverage and offers unique value to small businesses that purchase coverage through the Exchange.

Exchange staff recommend the following scope, structure and process for implementing the advisory group recommendation:

- **Advisory group scope:** advisory groups will provide advice, recommendations, and serve as sounding boards to the Exchange Board and staff on the issues listed below. Charters will be developed for each advisory group in the first quarter of 2013 to formalize the scope of the each groups' work.
 - **Plan Management Advisory Group:** qualified health plan (QHP) selection, monitoring, re- and decertification, quality rating, and ongoing benefit design issues.
 - **Marketing, Outreach and Enrollment Assistance Advisory Group:** marketing strategies by target population and media channel (e.g., digital, television, print), effective community outreach strategies, and strategies for providing in-person assistance with enrollment in insurance affordability programs.
 - **Small Employer Health Options Program (SHOP) Advisory Group:** strategies to raise interest in the SHOP and ensure that it provides value for small employers.
- **Advisory group structure and meeting frequency:** advisory groups will meet quarterly at minimum and more frequently if necessary. Members will be chosen a two-year term through 2014 at which time Exchange staff will evaluate the advisory group process and recommend to the Board any changes deemed needed to scope, structure and/or composition.
- **Advisory group selection process:** staff proposed to begin the advisory group selection process in October 2012 (see Table 1 for a timeline). Staff will accept nominations for advisory group membership and will vet the nomination with a committee of two Board

members. Members will be announced in November 2012, and the advisory groups will begin quarterly meetings January 2013. The Exchange will strive to ensure that advisory groups represent California’s cultural, geographic and economic diversity.

- **Advisory group composition:** the composition of each advisory group will be tailored to the scope of the group (see Table 2 for recommended committee composition). Up to two Board members may participate in each advisory group. Staff recommends that advisory groups be limited to 12-15 members in order to ensure meaningful participation by all members. Representatives of state partner department will be invited to participate as ex officio members.
- **Public participation in advisory group meetings:** staff recommends that advisory group meetings be open to the public and that opportunities be provided for public comment at designated times during the meetings. The advisory group committee calendar will be set early in the calendar year to facilitate public participation. Agendas and meeting materials will be posted in advance of the meetings.

Table 1. Proposed 2012-2013 Exchange Advisory Group Timeline

Activity	Date
Post Exchange Advisory Group nomination form on Exchange stakeholder website	October 1, 2012
Receive nominations	October 1, 2012 – November 2, 2012
Announce advisory group membership	December 3, 2012
Post 2013 advisory group meeting schedule	January 4, 2013
Quarter 1 advisory group meetings	January – March 2012
Quarter 2 advisory group meetings	April – June 2013
Quarter 3 advisory group meetings	July – September 2013
Quarter 4 advisory group meetings	October – December 2013

Additional Stakeholder Input

In addition to the three advisory groups outlined above, the Exchange will continue to participate in future activities under the AB 1296 stakeholder process which provides valuable stakeholder perspectives on eligibility and enrollment issues. The Exchange will also continue to convene ad hoc advisory groups as needed. This approach allows for robust stakeholder engagement through the current year with time to plan and secure resources for formal advisory groups beginning in 2013. While regional advisory groups were considered in the original Discussion Brief, the Exchange does not currently have the capacity to support that effort. Additional ad hoc groups will allow the Exchange to gather input from stakeholders around the state through a less formal process.

Table 2. Recommended Exchange Stakeholder Advisory Group Scope and Composition

Plan Management	Marketing, Outreach and Enrollment Assistance	Small Employer Health Options Program
<p>SCOPE</p> <p>The Plan Management Advisory Group will provide advice and recommendations to the Exchange Board and staff on qualified health plan (QHP) selection, monitoring, re- and decertification, quality rating, and ongoing benefit design issues</p>	<p>SCOPE</p> <p>The Marketing, Outreach and Assistance Advisory Group will provide advice and recommendations to the Exchange Board and staff on marketing strategies by target population and channel (e.g., digital, television, print), effective community outreach strategies, and strategies for providing in-person assistance</p>	<p>SCOPE</p> <p>The SHOP Advisory Group will provide advice and recommendations to the Exchange Board and staff on strategies to raise interest in the SHOP and ensure that it provides value for small employers</p>
<p>COMPOSITION</p> <p>The Exchange will solicit nominations from the following types of stakeholders for participation on the Plan Management Advisory Group:</p> <ul style="list-style-type: none"> • Health plans • Health care providers • Health care delivery and public health experts from independent academic, research or public health entities • Small business representatives and self-employed individuals • Consumer advocates with direct and substantial experience in health care • Large employers or large employer coalitions with direct and substantial experience in purchasing health care • California Department of Insurance (ex officio representative) • Department of Managed Health Care (ex officio representative) • Beginning in 2014, educated health care consumers who are QHP enrollees 	<p>COMPOSITION</p> <p>The Exchange will solicit nominations from the following types of stakeholders for participation on the Marketing, Outreach and Assistance Advisory Group:</p> <ul style="list-style-type: none"> • Individuals with direct and substantial experience in health care marketing and/or marketing to Exchange target populations • Individuals with direct and substantial experience in public relations • Individuals with direct and substantial experience in community outreach • Individuals and entities with experience in facilitating enrollment in health coverage • Advocates for enrolling hard to reach populations • California Department of Health Care Services (ex officio representative) • Managed Risk Medical Insurance Board (ex officio representative) 	<p>COMPOSITION</p> <p>The Exchange will solicit nominations from the following types of stakeholders for participation on the SHOP Advisory Group:</p> <ul style="list-style-type: none"> • Small business representatives and self-employed individuals • Health plans • Health insurance agents • Consumer advocates with direct and substantial experience in small employer health care issues • Large employers or large employer coalitions with direct and substantial experience in purchasing health care • Beginning in 2014, educated health care consumers who are QHP enrollees