

Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

**A. GENERAL INFORMATION**

1. Date

September 23,  
2016

2. Department

California Health Benefit Exchange/Covered California

3. Organizational Placement (Division/Branch/Office Name)

Administrative Services Division/Covered California University

4. CEA Position Title

Chief, Covered California University

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The mission of the California Health Benefit Exchange/Covered California (Exchange) is to increase the number of insured Californians, improve health care quality, lower costs, and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value. The Chief, Covered California University (CCU) is responsible for policy development regarding enterprise wide training content, delivery, and associated technology and for ensuring quality, consistency and accuracy in all training required to meet the operational needs of Covered California. The Chief consults with program managers to identify program training needs and training gaps to ensure appropriate technical training for internal and external individuals as well as job-required and career development training for staff. Technical competence in both internal and external representatives is critical to ongoing operations and Covered California's ability to meet its primary mission providing quality, affordable health care to uninsured Californians and small businesses. The Chief consults with Control Agencies, such as CalHR, on mandated and recommended training for managers, supervisors and staff and develops internal policy to meet these needs.

6. Reports to: (Class Title/Level)

Deputy Chief Operations Officer (Exempt)

7. Relationship with Department Director (Select one)

- Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): Advises Executives on internal and external technical and staff development training policies in a new, unique state organization.

8. Organizational Level (Select one)

- 1st
- 2nd
- 3rd
- 4th
- 5th (mega departments only - 17,001+ allocated positions)

## **B. SUMMARY OF REQUEST**

### **9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.**

All Exchanges are required by law to ensure that anyone who sells or enrolls consumers in ACA insurance policies have received appropriate training on all laws, regulations, guidelines and are qualified to explain coverage options and assist consumers and small businesses to enroll and remain enrolled in a Covered California policy. In addition, the employees at Covered California need to be equally educated in order to perform their work, and stay compliant with all State Laws and Regulations to promote the mission of Covered California. Covered California University (CCU) is the enterprise training and knowledge management branch.

The Chief, CCU makes policy decisions related to education for approximately 60,000 internal and external service channel partners who provide assistance or enroll consumers in Covered California insurance policies. In this capacity, the Chief provides consultative advice to Executive Leadership on complex issues which can have significant impacts on over 2.8 million California consumers. The Chief, Covered California University (CCU) is responsible for development of enterprise wide training policy including content, delivery, and technology. The Chief also sets policy associated with ensuring quality, consistency and accuracy in all training required to meet the operational needs of Covered California. The Chief serves as a training policy advisor and expert to executive leadership in recommending and implementing training policies and strategies as required to meet operational challenges. The Chief consults with Control Agencies, such as CalHR, on mandated and recommended training for managers, supervisors and staff; and develops internal policy to meet these needs.

The Chief consults with program managers to identify program training needs and training gaps to develop and administer technical training for internal and external individuals as well as job-required and career development training for staff. The Chief and subordinate managers also consult with programs on the most effective and efficient training delivery methods to meet the target training audience (examples include classroom, computer based, web based, tele- or videoconferencing, audioconferencing, web meetings, or webinars, and online colleges and universities). The Chief is responsible for the distribution of information and enterprise content management, developing and maintaining a repository of accurate information for the Exchange/CC using content management software or collaboration software (such as SharePoint and KnowledgeBase).

The Chief creates, develops, and oversees a "corporate university" program and develops training delivery strategy that incorporates the goals and vision of the Exchange/CC leadership. The Chief conducts activities and designs processes related to individual, organizational, and consumer learning and knowledge; and organizes and leads the CCU at a strategic level. The Chief provides policy level direction in the planning, organizing, conducting, and evaluating of training programs and utilizing training and eLearning development tools such as a Learning Management System(LMS) and Adobe Captivate. The Chief assures training delivery (instructor led and eLearning) is meeting the needs of the learners (oversee management of a team of instructors that facilitate service center training).The Chief directs and oversee vendors that provide tools (learning management system, content management system) and services (content development).

The Chief, through subordinate managers, selects, develops, mentors, trains, evaluates and manages a professional staff of 30. The Chief also sets priorities, assigns and provides managerial review of the work performed in the CCU. Develops and maintains team performance measurement tools. Provides regular and timely written performance appraisals to staff. Counsels staff and initiates disciplinary actions as necessary. The Chief also contributes to strategic goals and objectives of Covered California, attends meetings and may make presentations to Executive staff or the Board.

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**B. SUMMARY OF REQUEST (continued)**

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- Program is directly related to department's primary mission and is critical to achieving the department's goals.
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: Proper training and job knowledge for internal staff as well as external assisters and navigators is essential to provide accurate and timely plan evaluation and enrollment assistance to the public and consumers. Without this, consumers would not be able to make informed decisions about their health coverage. Additionally, Covered California would not be able to meet its mission of improving health care quality, lower costs and reduce health disparities through an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

**B. SUMMARY OF REQUEST (continued)**

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

The enabling legislation established Covered California as an independent public entity governed by a five-member board. Covered California is the State's health insurance purchasing pool for small business and individuals. The enabling statute imposes requirements on participating and non participating health plans and insurers. It also requires an integrated enrollment system that provides seamless coverage to impacted program participants of other State administered health coverage programs (Healthy Families, Medi-Cal, Access for Infants and Mothers, etc). Covered California represents an important component of health care reform.

CCU was developed from a concept in July 2014 whereby all training would be consolidated to ensure quality, consistency and uniformity and ensure all qualified Californians were aware of, and had access to affordable quality health care. Covered California is required by law to ensure that its Service Channel partners are provided certified training required for anyone who sells or assists consumers enrolling in one of its many health plans. Additionally, Covered California is a state agency that is required to provide annual and mandatory staff training based on state laws and regulations; remain compliant with those laws and regulations; and report back to its control agencies. Covered California also must maintain its workforce by providing core competency training on systems and processes that are job required for its employees. Covered California also creates and maintains extensive materials which provide information to its employees and service channel partners on a host of topics related to its health care plans, its systems, policies, laws and regulations related to health care, as well as related state and federal agencies that Covered California integrates with or works in conjunction with to move consumers from its policies to Medicare programs or into unsubsidized health plans.

Additionally, the technology supporting delivery of training is constantly evolving and the Chief, CCU must maintain current knowledge of these changes and set policy to maximize the use of various systems (classroom, video conference, web based, on line, etc), and minimize the associated expense.

This level of policy development will remain intense for the foreseeable future as the Exchange is unique in State Government and its operations and plan offerings will continue to be defined over the next few years. Covered California is still very much in the planning and development stage, and operational decisions are made on a daily basis as more information is garnered and issues/challenges are identified and resolved. This translates into a need to update and maintain training programs for individuals responsible for carrying out the business of Covered California. Additionally, Covered California has grown to a medium size agency from a core staff of less than 20 in a little over two years. Furthermore, Covered California is transitioning its training from vendors to CCU, and assuming all policy and technical content development. As a result, Covered California University (CCU) must be nimble and able to adjust its training offerings to meet the constantly changing and evolving role of Covered California.

Covered California has reassessed its management structure to ensure that the management team is at the level commensurate with the current and anticipated level of responsibility which will only increase as we continue to clarify our operations based on the evolving understanding of our complete responsibility. Consequently, the CEA level more appropriately fits the duties and ongoing policy development/ implementation responsibilities of the position.

### C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

As previously stated, the Chief, CCU makes policy decisions statewide that impact approximately 60,000 internal and external service channel partners who provide assistance or enroll consumers in Covered California insurance policies. Examples of the position's policy responsibility include:

**Covered California's Training Policy.** The CEA is responsible to develop or enhance policies regarding the training of its employees across multiple divisions and programs. Policies regarding staff competency training are critical to the mission of Covered California because of its daily interaction with over 2.8 million California consumers who contact Covered California on a daily basis for a large breadth of issues or concerns. Lack of training policies and oversight by CCU could subject consumers to poor information, lack of qualified individuals assisting consumers, staff unable to perform complex tasks which can cause underlying issues in support of Covered California's mission. For example, the Chief implemented a redesigned knowledge base for use by Service Center Staff and developed a comprehensive series of refresher courses for Service Center Representatives prior to open enrollment which decreased call handle times by approximately four minutes.

**Covered California's Service Channel (External) Training Policies.** The CEA is responsible for policy decisions regarding the training requirements of various service channels in order to support and/or enroll consumers in Covered California's health insurance and ensure competency and compliance with the Patient Protection and Affordable Care Act and contractual obligations. This includes affiliates such as Health Plan Call Centers, Health Plan Enrollers, Certified Agents and Counselors and Certified Entities who are in contact with health plan enrollees, surge vendors, e vendor staff, and service channel partners (navigators, certified enrollment counselors, certified enrollment entities). Enrollers act as an extension of Covered California's employees to bring quality care experiences to our consumers. Lack of training and oversight and adherence to our policies could have extensive impacts on millions of California consumers. For example the Branch Chief established the policy for redesigning Service Center Representative new hire course to blend eLearning instructions, hands on computer modules, instructor led and additional testing throughout the three-week course to increase competency levels for new staff.

**Policy Advisor -** Act as a policy advisor, consultant and training expert to executive leadership to recommend and implement policies and strategies that have statewide impact on stakeholders and consumers and incorporate the strategic goals and vision of the Exchange/CC leadership while ensuring compliance with the Patient Protection and Affordable Care Act, and other laws, rules and regulations. Collaborate with program managers to identify program needs and training gaps.

**Knowledge and Content Management –** Oversight and accountability for the activities surrounding the knowledge base system (Oracle RightNow) and content management. Responsible for the distribution of information and enterprise content management, developing and maintaining a repository of accurate information for the Exchange/CC using content management software or collaboration software such as SharePoint the Learning Management System, CCU Library, Knowledge Base Software, Learning Management System, SharePoint, and Technical Writers. Direct vendors that provide tools (learning management system, content management system) and services (content development).

**C. ROLE IN POLICY INFLUENCE (continued)**

13. What is the CEA position's scope and nature of decision-making authority?

The CEA 's scope and nature of decision-making is enterprise-wide and statewide for all policy related to the development and dissemination of educational information, process and procedure guides, and training required for civil service employees, vendors and service channel partners. The number of individuals impacted by the CEA's policies is staggering as it exceeds 60,000, and most of them are outside the organization. The CEA has a broad scope of influence and input into Covered California's policies that affect the organization, their consumers and influences development of policies that are cross-organizational such as Department of Health Care Services and its County Eligibility Workers and policies regarding the shared Information Technology Systems.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

The position will be developing and implementing new policy as well as implementing and modifying existing policy. New policies will be developed as required to meet the unique, evolving operational needs of Covered California. Existing policies will be reviewed and updated as required, commensurate with program changes of Covered California and external changes initiated by the Federal government, and/or other program partners. Covered California is in its fourth year with three open enrollment periods successfully completed. The Chief, CCU is in the process of writing new Training Polices and updating existing training policies to support the mission of Covered California. The Chief, CCU implements the Federal policies regarding Certified Agents and Enrollers who are required to be certified prior to working with consumers. The Chief, CCU is additionally required to ensure all employees at Covered California and Consultant staff are in compliance with all laws and regulations which require employees to take and remain compliance with training necessary to work at a State Agency. Additional areas where the Chief, CCU develops, interprets and implements policy are the Contracted Health Plans staff who enroll or assist consumers with insurance policies and enrollers who work at the health plans.