

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	2. Department
4/13/2018	Covered California

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

Executive

4. CEA Position Title

Deputy Director, Consumer Experience

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

The purpose of state health insurance exchanges is to make health insurance more affordable and easier to purchase for small business and individuals. Its mission 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 Department has five strategic initiatives or pillars: (1) Affordable Plans; Needed Care; (2) Effective Outreach and Education; (2) Positive Consumer Experience; and (5) Organizational Excellence.

The Consumer Experience Director is responsible for developing, implementing, measuring and refining an organization-wide multidisciplinary Consumer Experience Strategic Plan; establishing and maintaining department-wide relationships and creating cross-functional policies to facilitate a consistent and connected experience for Covered California consumers; and creating and maintaining a consumer-centric organization-wide culture. The duties of the Consumer Experience Director directly align with Covered California's mission and strategic initiatives by elevating and centralizing policy formulation directed at enhancing and improving the experience of its consumers.

6. Reports to: (Class Title/Level)

General Counsel

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):

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.**

Develop, implement, measure and refine an organization-wide multidisciplinary Consumer Experience Strategic Plan. Accountable to the Chief Deputy Executive Director and the Executive Director for formulating and implementing short, near and long-term consumer-centric policies across the organization. Participate in decision-making with the Chief Deputies and the Executive Director on highly sensitive, political and complex issues impacting consumer experience. Set strategy and develop organizational agreements, metrics and performance measures that are aligned with the strategic goals and priorities. Use metrics and performance measures to formulate consumer experience policy initiatives with an enterprise-wide, multidivisional organizational focus on serving California's diverse communities and building consumer loyalty.

Plan, organize, coordinate, and direct the work of the Consumer Experience Division. Direct administrative activities of the Consumer Experience Division including budget expenditures and controls, performance tracking, contract and grant monitoring, and managing human resources from recruitment and recognition to discipline. Mentor, evaluate, recruit, and retain staff. Provide annual evaluations to all eligible staff. Ensure effective use and maximization of staff resources across the Division. Establish working relationship with all Division areas and external partners to ensure prompt resolution of cross functional issues.

Establish and maintain deep department-wide relationships and create cross functional policies to facilitate a consistent and connected experience for Covered California consumers. Develop external engagement and communications policies to engage external stakeholders, consumers, advocates and health plan issuers in the development and implementation of the Covered California's consumer experience strategic plan.

Create a consumer-centric organization-wide culture by formulating internal policies and procedures designed to influence decision-making that embodies the Department's Strategic Pillars, particularly the Positive Consumer Experience Strategic Pillar. Play a decisive role in the making of decisions that align with the Strategic Pillars.

Build relationships with other State-based marketplaces throughout the nation to identify innovative approaches to improving consumer experience. Hold national policy forums with leaders of other State-based marketplaces to share best practices and state-of-the-art technologies designed to maximize consumer experience.

Ensure adequate resources are available and deployed to support the Board meetings and policy making by the Board. Attends Board meetings. Provide input on sensitive and complex issues, and make presentations to the five-member Board as required. Represent the Exchange/CC at various meetings. Travel throughout the state to attend trainings, meetings, and conferences.

**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:

The mission of Covered California 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. To achieve that mission, Covered California has established five strategic priorities:

- Affordable Plans: consumers purchase and keep Covered California products based on their perception that this is a good value for them.
- Needed Care: consumers receive the right care at the right time.
- Effective Outreach and Education: consumers understand what Covered California offers and have positive attitude about Covered California.
- Positive Consumer Experience: consumers have a positive experience from initial enrollment to keeping their coverage.
- Organizational Excellence: Covered California has the right tools, processes and resourced to support our team to deliver on its mission.

The mission of the Consumer Experience Division is to optimize the experience of Covered California's consumers throughout their journey with the Exchange. Understanding consumer experience at every stage of the consumer journey and formulating policies to enhance that experience is directly aligned with Covered California's mission and strategic priority to ensure a positive consumer experience.

**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.

Covered California was established relatively recently through the State's adoption of the federal Affordable Care Act. As it has matured, the Department has identified key strategic priorities that will enable it to successfully achieve its mission. Among those strategic priorities is Positive Consumer Experience. After successfully developing a multidisciplinary Consumer Experience Workgroup, it became evident that Covered California needed a dedicated team responsible for the oversight and coordination of policy initiatives with an enterprise-wide, multidivisional organizational focus on consumers. As an example of the need to establish this position, after five successful open enrollment periods, Covered California is now collecting data relative to consumer experience. Such data exists in varying forms throughout the organization and there is no centralized collection or analytics of that data. The Consumer Experience Division will collect data from the various Divisions to develop metrics and performance measures that will drive policy initiatives across Covered California designed to maximize consumer experience.

**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.

The Consumer Experience Director will be responsible for developing and revising Covered California's policies tied to the consumer experience life cycle strategic initiatives. This year, among other initiatives, the Consumer Experience Director, in collaboration with executive staff throughout Covered California, will focus on researching, measuring and developing policy initiatives related to service center improvements that will reduce the amount of time a consumer waits for a service center representative to take the consumer's call. The Director also be coordinating with other Divisions in the development of policies to enhance the provider directory which will result in allowing consumers to know which health plans have their doctor in their health plans. The Director will also collaborate with other Divisions in evaluating policy initiatives that are driving unnecessary appeals which will result in less consumer confusion and dissatisfaction. Implementation of these policies will ease consumer access to Covered California services and improve consumer satisfaction.

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

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

The position has enterprise-wide responsibility for the development of policies and strategic initiatives related to improving consumer experience. The policies developed to improve consumer experience throughout the consumer journey will impact every Division within Covered California as each Division plays an important role in creating a positive consumer experience. The CEA will be responsible for establishing and maintaining department-cross functional policies to facilitate a consistent and connected experience for Covered California consumers. The position has direct and frequent contact with the Executive Director, the Chief Executive Deputy Directors, other Directors and external stakeholders and participates in the overall policy development of Covered California.

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

The Consumer Experience Director will be responsible for developing and implementing both new policy and existing policy. The Director will implement, measure and refine an organization-wide multidisciplinary Consumer Experience Strategic Plan which will include short, near and long-term consumer-centric policies across the organization. The Director will also adopt metrics and performance measures to evaluate existing policy and, where necessary, formulate policy initiatives with an enterprise-wide, multidivisional organizational focus on serving California's diverse communities.



April 13, 2018

Suzanne Ambrose  
Executive Officer  
State Personnel Board  
801 Capitol Mall  
Sacramento, CA 95814

RE: New Career Executive Assignment (CEA, Level B) allocation, Deputy Director,  
Consumer Experience

Dear Ms. Ambrose,

As the Executive Director of Covered California, I am writing to confirm that I support the establishment of this CEA allocation and the associated duties and responsibilities.

Covered California is progressing in its transition to a fully operating entity, and development of effective consumer experience policies establishing and maintaining department-wide relationships and creating cross-functional policies to facilitate a consistent and connected experience for Covered California consumers; and creating and maintaining a consumer-centric organization-wide culture are essential to our success in this regard. This is particularly important to identify Covered California's mission and strategic initiatives by elevating and centralizing policy formulation directed at enhancing and improving the experience of its consumers.

Thank you in advance for your support of this essential CEA, Level B allocation. If you have any questions please let me know.

Sincerely,

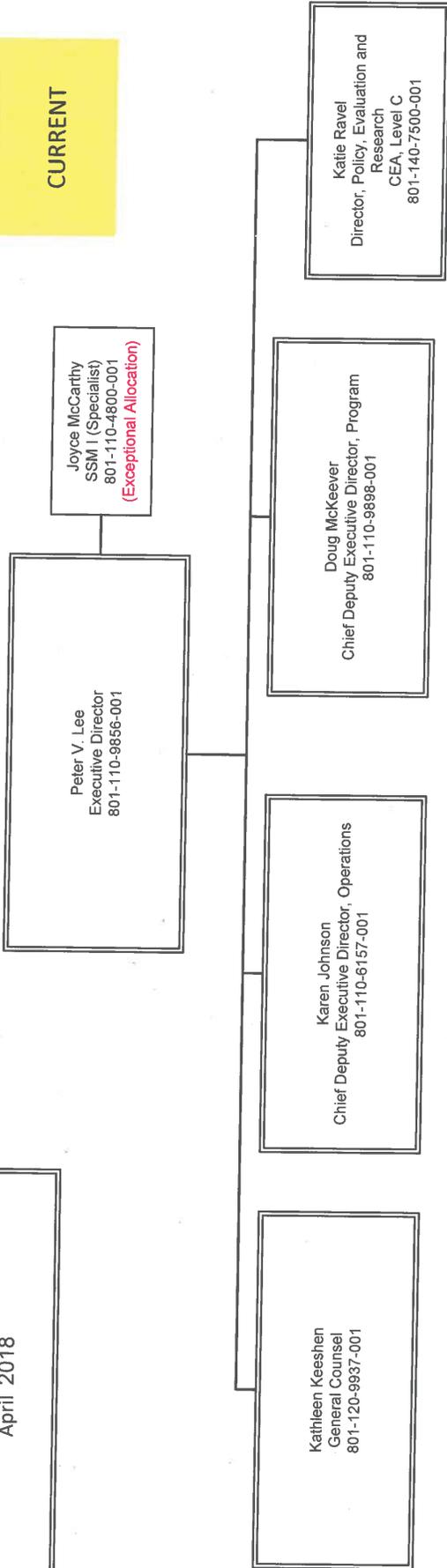


Peter V. Lee  
Executive Director

Modified Master  
4/24/18

CURRENT

California Health Benefit Exchange  
Executive Office - Operations  
Unit 110 (110.2)  
April 2018



LEGEND  
Red: Vacant - First Initial, Last Name  
Black: Filled  
Black Italic: Unestablished Position

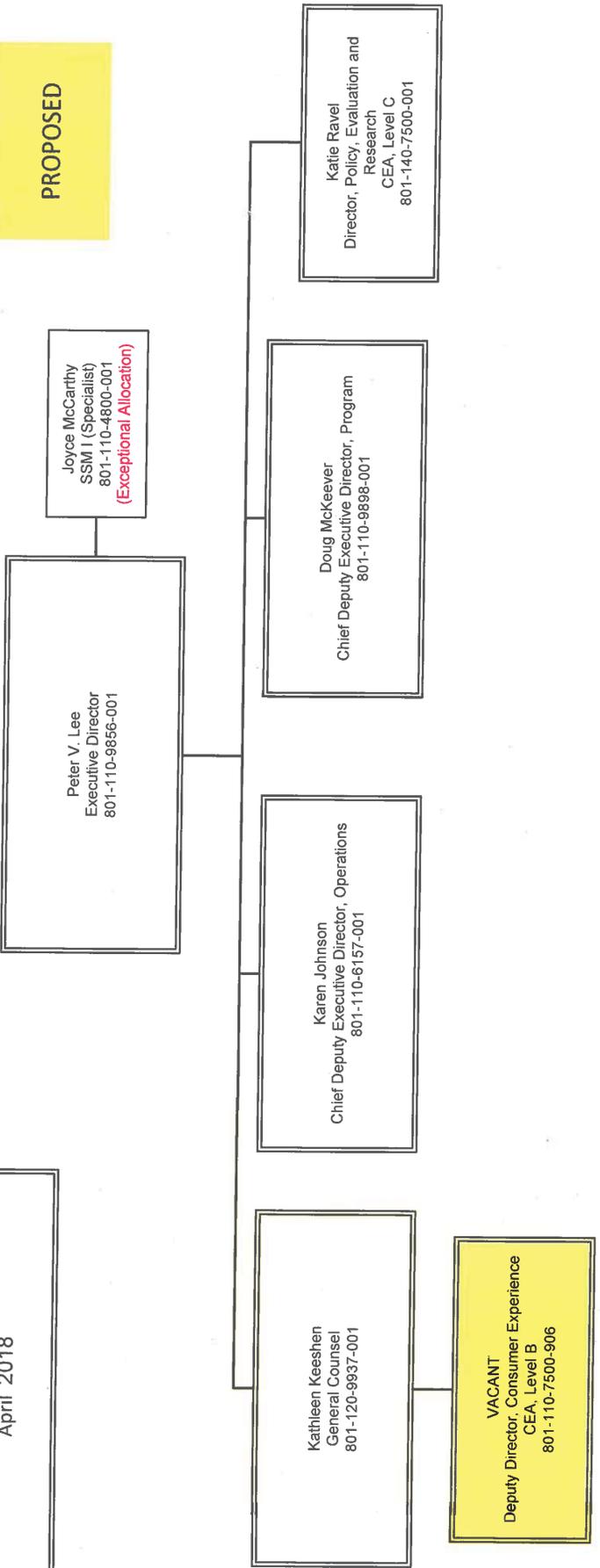
Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Modified Master  
4/24/18

PROPOSED

California Health Benefit Exchange  
Executive Office - Operations  
Unit 110 (110.2)  
April 2018



LEGEND  
Red: Vacant - First Initial, Last Name  
Black: Filled  
Black/Italics: Unestablished Position

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**JOB DESCRIPTION**

**HBEX 216 (08/16)**

FISCAL YEAR	RPA #
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*Instructions: Complete each section of the form. If the item is not applicable to the position, enter N/A.*

1. CLASSIFICATION Career Executive Assignment, Level B		2. POSITION NUMBER 801-110-7500-906		3. WORKING TITLE Director, Consumer Experience	
4. APPOINTEE		5. DIVISION/BRANCH/UNIT Consumer Experience		6. GEOGRAPHIC LOCATION Sacramento, CA	
7. APPOINTMENT TENURE <input type="checkbox"/> Permanent <input type="checkbox"/> TAU <input type="checkbox"/> Limited-Term (Exp. Date ____) <input checked="" type="checkbox"/> CEA			8. APPOINTMENT TIME BASE <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time (Fraction: ____) <input type="checkbox"/> Intermittent		
9. COLLECTIVE BARGAINING IDENTIFIER (CBID) Include appropriate letter (M, S, C, R) and unit number: <u>M01</u>			10. PROBATIONARY PERIOD <input type="checkbox"/> 6 months <input checked="" type="checkbox"/> 12 months		
11. CONFLICT OF INTEREST FILER <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes: Category: <u>1</u>		12. BILINGUAL POSITION <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes: (Approval Date: ____)		13. SUBJECT TO BACKGROUND INVESTIGATION <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	
14. SUPERVISOR'S NAME		15. SUPERVISOR'S CLASSIFICATION General Counsel			

FOR PERSONNEL USE ONLY:	APPROVED BY (CLASSIFICATION & PAY ANALYST NAME)	APPROVAL DATE	EFFECTIVE DATE
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**VISION, MISSION, AND VALUES STATEMENT**

The vision of the California Health Benefit Exchange (also known as Covered California) is to improve the health of all Californians by assuring their access to affordable, high quality care. Covered California allows individuals and small businesses to compare plans and buy health insurance in the private market. Covered California provides purchasers with a more stable risk pool, greater purchasing power, more competition among insurers and detailed information regarding the price, quality and service of health coverage. It also streamlines access for individuals to programs that provide subsidies for health coverage. Covered California has dramatically increased the number of insured Californians, and is working to improve health care quality, lower costs, and reduce health disparities through operating an innovative, competitive marketplace that empowers consumers to choose the health plan and providers that give them the best value.

Covered California recognizes that its employees are its most important asset. Our employees are the vital link that ensures that Covered California's vision, mission and values are fully realized. To this end, Covered California strives to ensure its workforce is drawn from the broadest segments of society and reflects the diversity of California so that we are poised to meet the present and future health care needs of the entire state's population.

All employees are expected to work cooperatively with others, maintaining regular, consistent, predictable attendance, possess integrity, initiative, dependability and good judgment.

**16. POSITION SUMMARY**

Briefly (1-3 sentences) describe the main purpose and function of the position, reporting relationships and the organizational setting:

Under the general direction of the Chief Deputy Executive Director, the Director of Consumer Experience will be responsible for driving and implementing a consumer experience strategy across all divisions within Covered California. The Director will collaborate with the Sales & Outreach, Eligibility & Enrollment, Service Center, Information Technology, Marketing, Ombuds, Public Relations, Policy, Program Integrity, and Communications Divisions in setting the strategic vision, direction and standards for a best in class consumer experience that is in alignment with the Mission, Vision and Strategic Pillars and the changing needs of the organization and its members. The Director will oversee consumer-centric research and analytics; develop and report on outcomes of key performance indicators; and prioritize cross-divisional initiatives that will drive ongoing development and refinement of the Covered California consumer experience roadmap. The mission of the Consumer Experience Division is to optimize the experience of Covered California's consumers throughout their journey with the Exchange. Understanding consumer experience at every stage of the consumer journey and formulating policies to enhance that experience is directly aligned with Covered California's mission and strategic priority to ensure a positive consumer experience.

EMPLOYEE'S STATEMENT: I acknowledge receipt of this job description and understand the requirements and duties of the position. I have discussed the job description with my supervisor. I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor.)

The statements contained in this job description reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence or relief, to equalize peak work periods, or to otherwise balance the workload.

EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
	>	
SUPERVISOR'S STATEMENT: I certify that the above accurately represents the duties of the position. I have discussed the duties of the position with the employee and have provided a copy of this job description to the employee named above.		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
	>	

**HBEX 216 – JOB DESCRIPTION**

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CLASSIFICATION Career Executive Assignment, Level B	POSITION NUMBER 801-110-7500-906	WORKING TITLE Director, Consumer Experience
APPOINTEE	DIVISION/BRANCH/UNIT Consumer Experience	GEOGRAPHIC LOCATION Sacramento, CA

**17. DESCRIPTION OF DUTIES**

Percentage of Time (E) or (M)	Indicate the duties of the position and the percentage of time spent on each. Group related tasks under the same percentage. Percentages should be increments between 5% to 35%, with the highest percentage first. Identify essential functions with (E) and marginal functions with an (M) in the percentage column. "Other duties as required" cannot be used as a task statement.
25% (E)	Develop, implement, measure and refine an organization-wide multidisciplinary Consumer Experience Strategic Plan. Accountable to the Chief Deputy Executive Director and the Executive Director for formulating and implementing short, near and long-term consumer-centric policies across the organization. Participate in decision-making with the Chief Deputies and the Executive Director on highly sensitive, political and complex issues impacting consumer experience. Set strategy and develop organizational agreements, metrics and performance measures that are aligned with the strategic goals and priorities. Use metrics and performance measures to formulate consumer experience policy initiatives with an enterprise-wide, multidivisional organizational focus on serving California's diverse communities and building consumer loyalty.
20% (E)	Plan, organize, coordinate, and direct the work of the Consumer Experience Division. Direct administrative activities of the Consumer Experience Division including budget expenditures and controls, performance tracking, contract and grant monitoring, and managing personnel from recruitment and recognition to discipline. Mentor, evaluate, recruit, and retain staff. Provide annual evaluations to all eligible staff. Ensure effective use and maximization of staff resources across the Division. Establish working relationships with all Division areas and external partners to ensure prompt resolution of cross functional issues.
20% (E)	Establish and maintain deep department-wide relationships and create cross functional policies to facilitate a consistent and connected experience for Covered California consumers. Develop external engagement and communications policies to engage external stakeholders, consumers, advocates and health plan issuers in the development and implementation of the Covered California's consumer experience strategic plan.
15% (E)	Create a consumer-centric organization-wide culture by formulating internal policies and procedures designed to influence decision-making that embodies the Department's Strategic Pillars, particularly the Positive Consumer Experience Strategic Pillar. Play a decisive role in the making of decisions that align with the Strategic Pillars.
15% (E)	Build relationships with other State-based marketplaces throughout the nation to identify innovative approaches to improving consumer experience. Hold national policy forums with leaders of other State-based marketplaces to share best practices and state-of-the-art technologies designed to maximize consumer experience.
5% (M)	Ensure adequate resources are available and deployed to support the Board meetings and policy making by the Board. Attends Board meetings. Provide input on sensitive and complex issues, and make presentations to the five-member Board as required. Represent the Exchange/CC at various meetings. Travel throughout the state to attend trainings, meetings, and conferences.

**HBEX 216 – JOB DESCRIPTION**

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APPOINTEE	DIVISION/BRANCH/UNIT Consumer Experience	GEOGRAPHIC LOCATION Sacramento, CA

**18. SCOPE AND IMPACT**

a. Responsibility for Decisions and Consequence of Error – Describe the level of independence exercised and the consequence of actions taken by this position.  
The Consequence of Error for the Consumer Experience Division is high and has a significant impact on Exchange/CC's operations, efficiency, and public trust. Failure to execute good judgment includes loss of revenue, media scrutiny, litigation, and public confidence. The incumbent must exhibit an exceptional understanding of legislative protocol and the political sensitivity of various policy issues to ensure accurate and appropriate representation of the Department within the Administration, and with the Legislature and others in the legislative process.

b. Administrative Responsibility – Describe the position's management responsibilities, including the size of the operating budget.

The Consumer Experience Division has an operating budget of \$1 million dollars.

c. Supervision Exercised – List the classifications supervised by the position, both directly and indirectly.

The CEA will exercise direct supervision over the following classification: Health Program Specialist; and indirectly supervise the classifications of Associate Governmental Program Analyst, and Office Technician (Typing).

d. Personal Contacts – List the internal and external contacts with whom the position regularly interacts.

Internal:

Senior Leadership including the Board, Executive Director, Chief Deputy Executive Directors, Deputy Chief Operations Officer, Division Chiefs and other managers and staff.

External:

Legislators, Media; Vendors and Contractors, other State agencies, consumers, stakeholders, consumer advocates and health and dental plan issuers.

**19. PHYSICAL AND ENVIRONMENTAL DEMANDS**

Describe the position's physical exertion requirements and environmental demands.

**WORK ENVIRONMENT**

Work in a climate-controlled office under artificial lighting; exposure to computer screens and other basic office equipment; office space is open and thus noisy; work in a high-pressure fast-paced environment, under time critical deadlines; work long hours; must be flexible to work days/nights, weekends and select holidays as needed; during peak periods, may be required to work overtime; appropriate dress for the office environment.

**ESSENTIAL PHYSICAL CHARACTERISTICS**

The physical characteristics described here represent those that must be met by an employee to successfully perform the essential functions of this classification. Reasonable accommodations may be made to enable an individual with a qualified disability to perform the essential functions of the job, on a case-by-case basis. Ability to attend work as scheduled and on a regular basis and be available to work outside the normal workday when required. Continuous: Upward and downward flexion of the neck. Frequent: sitting for long periods of time (up to 70%); repetitive use of hands, forearms, and fingers to operate computers, mouse, and dual computer monitors, printers, and copiers (up to 70%); long periods of time at desk using a keyboard, manual dexterity and sustained periods of mental activity are need; Frequent: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level, and lifting and carrying of files, and binders.

Note: Some of the above requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

**20. WORKING CONDITIONS AND REQUIREMENTS**

Specify the working conditions applicable to this position.

High Rise Office Building:  No  Yes

Work Schedule/Hours:

Monday - Friday, 8:00am - 5:00pm, ability to attend work on a regular basis and to be available to work outside the normal workday when required.

Travel Requirements:

May require travel to field offices throughout the State of California.

Other:

N/A