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

<table>
<thead>
<tr>
<th>1. Date</th>
<th>2. Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/10/2022</td>
<td>Department of Health Care Access and Information (HCAI)</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>3. Organizational Placement (Division/Branch/Office Name)</th>
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<tbody>
<tr>
<td>Information Services Division</td>
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<table>
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<tr>
<th>4. CEA Position Title</th>
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<tbody>
<tr>
<td>Branch Chief / Chief Planning Officer</td>
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<thead>
<tr>
<th>5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)</th>
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<tbody>
<tr>
<td>The Planning and Management Branch Chief serves as the Chief Planning Officer and is responsible for planning, organizing, and directing critical functions for the Information Services Division, including all division-wide policies, strategic projects oversight, administrative and business services, and administration of all public boards and committees. Incumbent is responsible for legislative activities affecting the division, budget and budget changes proposals, ensuring all committees comply with the Bagley-Keene Public Meeting Act, and all areas of project oversight and lifecycle. Incumbent must collaborate and maintain positive working relationships with HCAI executive management and Agency, Finance, Technology, and Legislative staff.</td>
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<tr>
<th>6. Reports to: (Class Title/Level)</th>
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<tbody>
<tr>
<td>Deputy Director, CEA - B</td>
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<tr>
<th>7. Relationship with Department Director (Select one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.</td>
</tr>
<tr>
<td>☑ Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.</td>
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</tbody>
</table>

(Explain): On behalf of the Deputy Director (CEA B), represents the Information Services Directory directly on critical policy issues and interfaces independently and directly with the HCAI Director and Executive Management Team.

<table>
<thead>
<tr>
<th>8. Organizational Level (Select one)</th>
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<tbody>
<tr>
<td>☐ 1st</td>
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<td>☐ 2nd</td>
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<td>☑ 3rd</td>
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<tr>
<td>☐ 4th</td>
</tr>
<tr>
<td>☐ 5th (mega departments only - 17,001+ allocated positions)</td>
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</tbody>
</table>
9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

Under general direction from the Deputy Director / Chief Information Officer, the Planning and Management Branch Chief is responsible for planning, directing, and overseeing a comprehensive program for policy, planning, project portfolio management, strategy, stakeholder engagement and communication, and acquisition and management services. These roles and functions are administered in support of all Information Services Division (ISD) branches and organizational units, and in close coordination with all HCAI program areas, administrative support, legal services, legislative and public affairs, and the Director’s Office. This is a senior leadership role in the ISD, with a large degree of independence and autonomy, responsible for formulating and implementing both internal and external policy that have a significant impact on all ISD programs. This role is responsible for administering the over $25 million program budget.

The Planning and Management Branch Chief will play a primary role in coordinating division-wide planning, establishing program policies, and monitoring performance metrics for success for critical and emerging ISD programs, including, AB 1810 (2018) / AB 80 (2020) Healthcare Payments Data Program, AB 962 (2020) Hospital Supplier Diversity Program, SB 650 (2021) Skilled Nursing Facility Data Transparency, the AB 1204 (2021) Hospital Equity Measures Reporting, and the AB 184 (2022) Office of Health Care Affordability. Additionally, the Planning and Management Branch Chief will play a vital role in planning, establishing program policies, and monitoring performance metrics for success for the implementation of data and technology services to support AB 1020 (2021) Hospital Fair Billing, as well as the following health care workforce initiatives:
- Health Professions Career Opportunity Program (SB 395, 2021)
- California Medical Scholars Program (2021 Budget Act)
- Certified Nursing Assistant Workforce Program (2021 Budget Act)
- Children and Youth Behavioral Health Initiative (2021 Budget Act)
- Geriatric Care Workforce Program (2021 Budget Act)
- Clinical Infrastructure: Reproductive Health Care (2021 Budget Act)
- Various Healthy California for All Workforce Programs (2021 Budget Act)
- Song-Brown Healthcare Workforce Program Augmentation (2021 Budget Act)
- Health Workforce Research Data Center (2021 Budget Act)
- California Reproductive Health Services Corps (2022 Budget Act)
- Licensed Behavioral Health Professionals (2022 Budget Act)
- Masters of Social Work Students (2022 Budget Act)
- Social Work Initiative (2022 Budget Act)
- Addiction Psychiatry and Addition Medicine Fellowships (2022 Budget Act)
- Psychiatry Graduate Medical Education Programs (2022 Budget Act)
- Psychiatrists in State Hospitals (2022 Budget Act)
- Children and Youth Behavioral Health Initiative - Welfare Programs (2022 Budget Act)
- Golden State Social Opportunities Program (2022 Budget Act)
- Diverse Future Behavioral Health Workers and Urgent Needs in Behavioral Health (2022 Budget Act)
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 Branch Chief and Chief Planning Officer will assure Healthcare Access and Information (HCAI) advances safe, quality healthcare environments through innovative and responsive service and information. In accordance with this mission, HCAI's portfolio of healthcare data, analytics, and research programs has expanded by an order of magnitude in budget and broadened in scope. Other programs and responsibilities requiring the development of technology and data services have likewise expanded.

By being responsible for planning, directing, and overseeing a comprehensive program for policy, planning, project portfolio management, strategy, stakeholder engagement and communication, and acquisition and management services, the Planning and Management Branch Chief will have a critical role in ensuring the department meet its mission. For example, a core function of HCAI providing access to safe, quality health care is through its data and information programs that support informed policy and practice decisions by policy makers and healthcare entities. To do this, HCAI's data and analytics program must collect quality data from health care entities, ensure that data measures meet best standards and can be integrated and linked with other data, that data collection conform to both state and federal privacy and security requirements, and that data is useable by analysts and researchers to produce actionable timely insights that can inform decision-makers. This includes meeting the legislative mandates for legislative reports required by recently-enacted legislation (as described elsewhere in this request) in California Health & Safety Code Sections [AB 1810 / AB 80] 127673(k)(1) and 127674(g) as well as the public reports and stakeholder recommendations required to be made public by HCAI required by California Health and Safety Code Sections [AB 1810 / AB 80] 127673.7, 127673.8, [AB 962] 1339.88(d)(1), [SB 650] 128734.1(b), [AB 1204] 127374(c), 127376(c)(2), and 127376(d)(3). The Branch Chief's role in policy oversight, strategic planning, and stakeholder engagement is critical to this function and to ensuring the department can effectively meet its mission and comply with statutory mandates.

The Planning and Management Branch Chief will also ensure that HCAI's Hospital Fair Billing Program (AB 1020, 2021) and all of the department's various workforce programs and functions utilize data and technology to the maximum extent to create efficiencies, improve program outcomes, and data support-informed and evidence-based program evaluation. The Branch Chief's role in data and technology policy oversight, strategic and project planning, budgeting, and stakeholder management is critical to this function.
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.

Since the establishment of the Planning and Management Branch in 2017, the Information Services Division’s size, scope, and complexity of programmatic and technical responsibilities has considerably grown. The addition of the following legislative mandates has added staff, requirements, technology systems, data programs, data elements, and programmatic responsibilities to the Planning and Management Branch's scope of responsibilities:

- SB 17 (2017) – Prescription Drug Cost Transparency
- AB 434 (2017) – State Web Accessibility
- AB 962 (2019) – Hospital Supplier Diversity
- AB 204 (2019) – Enhanced Community Benefit Plan Reporting
- AB 80 (2020) – Healthcare Payments Data Program Additional Authority
- SB 650 (2021) – Skilled Nursing Facility Data Transparency
- AB 1204 (2021) – Hospital Equity Measures Reporting

ISD is now responsible for overseeing five public boards and committees; whereas prior to 2018 it was only responsible for one. New public boards were added by AB 80, AB 962, and AB 1204. Moreover, ISD will be responsible for coordinating closely with the new Health Care Affordability Board, established by California Health and Safety Code Section 127501.10, and subsidiary advisory committee, that will be established to oversee the administration of the Office of Health Care Affordability (AB 184), ensuring that program policies and activities are tightly coordinated between the Healthcare Payments Data Program (AB 80) advisory committee, the Hospital Equity Measures Reporting (AB 1204) advisory committee, and other ISD stakeholder boards and committees that have a role in HCAI data policies and programs. Stakeholder engagement is a critical role of the Branch Chief's function. Designing, implementing, and overseeing program policies and functions that engage and support these public bodies, and integrate them with HCAI programs to meet HCAI's statutory mandates, is a critical component to the Branch Chief's responsibility.

Additionally, the Planning and Management Branch Chief will play a vital role in planning, establishing program policies, and monitoring performance metrics for success for the implementation of data and technology services to support AB 1020 (2021) Hospital Fair Billing, as well as the following health care workforce initiatives:

- Health Professions Career Opportunity Program (SB 395, 2021)
- California Medical Scholars Program (2021 Budget Act)
- Certified Nursing Assistant Workforce Program (2021 Budget Act)
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- Golden State Social Opportunities Program (2022 Budget Act)
- Diverse Future Behavioral Health Workers and Urgent Needs in Behavioral Health (2022 Budget Act)

The addition of these significant responsibilities is putting pressure on the ISD staff and organizational units to effectively perform their functions, given the great increase in complexity, scale, and volume of new programmatic requirements. The department's authorized budget has grown by nearly 1,000% and its authorized staffing positions by 20% over the past two years.
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 proposed CEA will service as a policy, planning, project portfolio management leader on a wide range of Information Services for all of HCAI.

This role will oversee and administer all aspects of division-wide policy analysis, development, implementation, and oversight. It will proactively perform regular environmental scans of California legislation, Federal legislation, and other policies impacting ISD programs; formulate, analyze, and make recommendations to ISD senior management to support program administration and strategy; monitor implementation. This role is also responsible for the promulgation of regulatory changes and analyses of pending legislation that impact ISD programs. This role will also represent and ensure, diversity, equity, and inclusion are integrated into ISD planning considerations; coordinate and collaborate with the HCAI Chief Equity Officer (and serve as ISD's Chief Equity Officer) to ensure adoption of an Equity Action Plan into ISD policies and projects; and integrate equity into strategic goals and key performance indicators.

(1) For example, with the Hospital Equity Measures Reporting Program, authorized by AB 1204 (2021), the Branch Chief will lead the development of division-wide program policies and procedures, coordinating across ISD branches and the domains of data operations and analytics and research, to develop health care quality measures stratified by person demographic and social determinants of health categories, establish an annual program to collect this data from California hospitals along with an equity report that describes hospitals' plan to address disparities identified in the data, and oversee a public committee of stakeholders that will make recommendations to the HCAI director and provide a public forum for transparency. The Branch Chief will serve as the administrator of the advisory committee, establishing and maintaining positive relationships with high-level stakeholders and coordinating with the Chief Data Officer who will serve as the HCAI representative on the board, per California Health and Safety Code Section 127376. This is an ongoing program, and advisory board, that will not be a one-time occurrence but rather require continual revision. This program is critical to addressing the increasing crisis of health equity in the state of California; the Branch Chief will play a central role to this program's successful outcomes.

(2) AB 80 (2020) provides the necessary enabling authority for HCAI to establish the Healthcare Payments Data Program. The Branch Chief will lead and coordinate the implementation of program policies across all areas of the organization, working with executive-on-level stakeholders across all areas of the California healthcare sector. The Branch Chief is the principle coordinator of policymaking from across the data operations and analytics and research functional areas of the Information Services Division, working closely with subject matter experts in ISD. The Healthcare Payments Data Program will improve transparency in the healthcare system through data reporting for the public as well as data for academic research and data that will result in innovative approaches in healthcare policy and practice. The result of the Branch Chief's role will be to reduce costs, improve quality, and improve equity in healthcare through innovative and responsive data, analysis, research, and reports that serve a number of audiences, including statewide policymakers assessing critical healthcare reform in California.

(3) This role will serve as the ISD Chief Equity Officer, and the chief manager responsible for ISD legislative affairs. The Branch Chief will be responsible for all aspects of legislative activities, including bill analysis, budget analysis and budget change proposals, enrolled bill reports, technical assistance with legislative offices, and more. The Branch Chief will be responsible for ensuring that the department's vision and mission are represented in bills impacting ISD. Beyond programmatic bills that affect ISD's data and research programs, all bills with any potential relationship to HCAI must be assessed by ISD for technology and data impacts -- this includes all legislation affecting HCAI's seismic safety program, workforce development programs, and healthcare facility loan insurance programs. HCAI's legislative portfolio has significantly increased in recent legislative cycles, with bill volumes increasing several times over. Additionally, the scope, depth, and breadth of policy proposals affecting HCAI has expanded, with HCAI becoming the center for healthcare reforms centered around healthcare data, workforce, prescription drug, and affordability. The Branch Chief will be the principle policy maker in influencing these legislative policies for the division -- across a broad scope of policy and health care sectors. Moreover, as ISD's Chief Equity Officer, the Branch Chief will be responsible to ensure that all ISD bill analyses include an equity lens, providing a critical assessment of the equity impact of proposed legislation for HCAI's healthcare data programs and California residents as a whole.
C. ROLE IN POLICY INFLUENCE (continued)

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

The proposed CEA position will direct policy analysis, development, and evaluation across the Information Services Division. The proposed CEA will have the authority to independently develop, implement, and oversee decisions that impact all Information Services Division programs. The CEA will:

- Independently develop and advance policy initiatives within the scope and authority of the Planning and Management Branch, affecting all ISD programs.
- Make recommendations to the Deputy Director and HCAI Directorate for cross-cutting policy initiatives that improve HCAI programs and services and help meet HCAI's mission.
- Directly oversee coordination of all policy and comprehensive program service delivery for the following HCAI health data programs and statutory mandates recently added to ISD's portfolio: ensuring alignment between data operations and data analytics and research functions for Hospital Supplier Diversity (AB 962, 2019), Enhanced Community Benefit Plan Reporting (AB 204, 2019), Healthcare Payments Data Program Additional Authority (AB 80, 2020), and Hospital Equity Measures Reporting (AB 1204, 2021).
- Serve as the formal committee administrator, formulate policy recommendations, and facilitate policy implementation activities for the following ISD public boards and committees: Healthcare Payments Data Program Advisory Committee (AB 80, 2020), Healthcare Payments Data Program Data Release Committee (AB 80, 2020), Hospital Supplier Diversity Commission (AB 962, 2020), and Hospital Equity Measures Reporting Committee (AB 1204, 2021).
- Responsible to ensure all HCAI programs and staff comply with the Bagley-Keene public meeting rules for all five ISD-administered public bodies.
- Provide policy recommendations to the California Health and Human Services Agency and the Department of Finance relating to effective approaches for implementing the requirements of the various new and emerging policies and programs affecting ISD.
- Represent HCAI with high-profile healthcare and government stakeholders, legislative meetings and hearings, state and local meetings, national meetings, and conferences related to ISD's programs.
- Serve on professional committees and other advisory boards with sister agencies and partner organizations external to HCAI, representing the Department and the HCAI Director.
- Initiate and lead implementation of ISD policy initiatives approved by HCAI leadership.
- Proactively propose new policies and changes to existing policy that have downstream effects resulting in positive impacts on services—across public and private healthcare service partners—and ultimately support the health and wellbeing of all Californians.

The CEA will report to the Deputy Director, Information Services Division. Decisions regarding implementation, recommendation, and evaluation of ISD existing, new, and emerging policies and new legislation will be made independently by the proposed CEA. Additional decision-making authority regarding the described policy, normally assigned to the Deputy Director, Chief Deputy Director or the Director may be delegated to the CEA on an as needed basis.

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

The proposed CEA position will do both, develop and implement new policy as well as interpret and implement existing policy. Responsibilities include policy considerations related to the breadth of existing healthcare data and analytics programs, some of which date back decades, as well as an expanding portfolio of new healthcare data and analytics programs that must be integrated with the existing portfolio of both a large breadth of healthcare data and wide variety of technology programs. (New and existing programs are identified in questions 21 and 23.) A resulting variety of policy issues must be aligned to the extent possible such that these initiatives work together as one ISD program portfolio to deliver the greatest positive impact for California. Alignment in program policy and procedure extends to HCAI's other program areas, such as the new Office of Health Care Affordability (AB 184, 2022) and the Healthcare Workforce Development Division, particularly in the area of technology implementation and coordination of policies to meet HCAI's strategic and enterprise priorities. The CEA will have the authority to independently develop, recommend, and propose to HCAI leadership policy decisions across the ISD program portfolio.

In alignment with new legislative mandates and programs, the CEA will be responsible for the design, development, and implementation of critical data, analytics, and research programs application of research findings, leading practices from national peer agencies, and best practices for established programs for new policy development. Additionally, the proposed CEA will be responsible for developing and proposing government policies associated with the Department's strategic plan, statutes, and funding sources, specifically to align complex data, technology, security, and privacy policies with the department's mission and strategic plan.