Washington Health Benefit Exchange

2015 Draft Baseline Operating Plan and Budget for Board Meeting

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Long-term Vision

WAHBE aims to become the best Exchange in the country

CEO Goals

Vision: Become the best Exchange in the country

1. Meet/exceed our **enrollment** targets
   a. Improve website performance to achieve 90% or greater throughout
   b. Review and revise enrollment projections as appropriate for 2015 and 2016, reach enrollment projections for 2015

2. Build the culture to effectively provide for a positive end-to-end **customer experience**
   a. Benchmark customer service standards to best practices
   b. Empower employees to use good judgment in meeting customer needs
   c. Use data from customer service survey to improve customer experience

3. Transition organization for long-term operational success, including financial sustainability beginning in 2015
   a. Develop 2015-2017 budget to achieve sustainability and efficient operating capacity
   b. Conduct organizational review and restructuring (if necessary) for optimal performance and in preparation for self-sustainability in 2015
   c. Recruit, hire, and retain competent, capable, enthusiastic, and customer oriented staff
   d. Codify and refine key **business processes**, maintaining a healthy balance between formalization and flexibility
   e. Maintain an **entrepreneurial culture**, capable of adapting rapidly to changes in customer needs in the marketplace
   f. **Partner with** legislators, key stakeholders, and partners to achieve support and understanding of sustainability issues and operational priorities.

Board Proposed Core Business Imperatives – Draft Only

The following are the strategic business imperatives requiring clear Board-driven direction for our continued success:

- Budget and Sustainability Strategy for 2015 and beyond
- Affirm our core purpose and value to the health care system
- Meet enrollment growth objectives for 2015 and beyond and build-out outreach partnership networks
- Improve the HPF web-based platform – strive for operational excellence
- Clearly define HPF portal role for Medicaid and its enrollees

2011 - 2014 Budget and Projections ($000's)

		2011		2012		2013		2014
	2011-2015							
	Total Budget	Budget 2011	Audited	Budget 2012	Audited	Budget 2013	Actual through 12/2013	Projected Spend in 2014
GROSS REVENUES								
Grant & Medicaid Revenue: Level 1A Original	23,784	1,036	1,036	13,705	15,175	9,446	7,573	
Grant & Medicaid Revenue: Level 2	132,107			40,269	18,781	61,536	64,666	48,660
Grant Revenue: IPA	8,404					2,801	2,801	5,602
Grant Revenue: Level 2S Comm	8,005					3,739	4,002	4,002
Grant Revenue: Level 2S IT & Staff	13,193					2,744	6,597	6,597
Grant & Medicaid Revenue: New Level 1B 2014	88,338							88,338
TOTAL GROSS REVENUES	**273,831**	1,036	1,036	**53,975**	33,956	80,266	85,639	153,200
OPERATING EXPENSES								
Salaries & Benefits	28,778	127	127	5,008	2,207	13,400	12,490	14,026
Marketing & Advertising	25,296			1,407		8,222	8,716	13,372
Consulting & Professional Service	29,613			7,928	5,000	8,724	10,300	19,920
IT Infrastructure & Communications	1,636			802		449	549	
General & Administrative	11,292	8	8	645	708	710	1,539	6,156
Facilities Related	4,415			1,035	525	1,837	3,063	1,807
Appeals Related	1,272							525
HPF Systems/Operations	171,528	900	900	37,150	25,516	46,923	48,982	71,281
TOTAL OPERATING EXPENSE	**273,831**	1,036	1,036	53,975	33,956	80,266	85,639	127,088
FUNDING SOURCE								
Grant Medicaid Allocation	8,451			536	536	2,768	2,768	5,148
Federal Grant	265,379	1,036	1,036	53,439	33,421	77,498	82,871	148,052
TOTAL FUNDING SOURCE	**273,830**	1,036	1,036	53,975	33,956	80,266	85,639	153,200

2015 IT Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
IT Operations and Enhancements			$13,370
- Operations and Maintenance	$7,550	Deloitte	
- HPF Support License Fee	1,528	Deloitte	
- Eligibility License Fee	1,300	DSHS/ESA	
- Strategic Direction Initiative	96	Akamai Tech	
- Plan Management License Fee	1,644	eHealth	
- HPF Platform License Fee	1,100	Oracle	
- Professional Services/Support License Fee	152	Microsoft	
Other Costs			$5,792
- Salaries and Benefits (43 FTE)	$5,129		
- Rent, Utilities, etc.	319		
- Equipment, Travel, etc.	345		
		Total	**$19,163**

2015 IT Baseline Assumptions

Key Assumptions and what is funded by requested dollars?

- Deloitte – HPF Enhancement and New Releases will not be included in Baseline budget since all 2015 currently planned version upgrades are expected to be funded by the Level 1B grant (expected to apply for No-cost extension into 2015)
  - 2015 Annual Deloitte M&O Costs: The 2014 base amount is $7,225,000. Current baseline assumption will increase this amount by 4.5% for 2015. HBE and Deloitte are currently in discussion to agree on 2015 pricing and service levels.
- All IT system hardware and software acquisitions are expected to be funded by Level 1B grant funding as well.
- Support of Mobile and Business Intelligence will be done with existing staff.
- Currently IT uses 31 contractors. To curtail costs, IT will have no contractors or additional consultants for IT Operational activities/work during 2015.

2015 Operations Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Call Center and Other Operational Services			$17,440
- Customer Service Center	$15,131	Faneuil	
- Print Services	1,009	KP Corp	
- Document Management System	820	HCA	
- Translation	300	LinguaLinx, Inc	
- Other Call Center costs	180	Firefly	
Other Costs			$3,525
- Salaries and Benefits (34 FTE)	$3,000		
- Rent, Utilities, etc.	252		
- Equipment, Travel, etc.	272		
		Total	**$20,965**

2015 Operations Baseline Assumptions

Call Center – Faneuil – $15,131,000

- Assume an average of 250 CSR, 800 Phone Service and Customer Relationship Management System (CRM) License Fees.
- This level of service would have an average call wait time of 20 minutes with an estimated average daily call volume of 8,543. Peak and low estimated daily call volumes are 12,419 and 8,159.

Printing and Postage – K/P Corp - $1,009,000

- Overall annual funding is assumed to be provided by a no-cost extension of Federal Grant funds, except for $1,009,000 that was proviso in the Engrossed Substitute Senate Bill 6002.
- We must provide hard copy or email options under Federal ACA requirements. Client can choose which option they prefer.
- 2014 costs are currently under budget for 2014 and expected to remain favorable relative to budget.
  - Assumption is that clients are choosing to be notified by email for both QHP and Medicaid at a higher rate than initially estimated.

Contractors

- Operations currently uses 16 contractors. To curtail costs, Operations will have no contractors or additional consultants for Operational activities/work in 2015.

2015 Finance & Admin Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Financial and Audit Services			$1,435
- External Audit - A-133	$300	Moss Adams	
- Carrier Assessment Invoicing	100	BMI	
- Legislative Mandated Performance Audit	735	State Auditor's Office	
- Financial System O&M	200	TBD	
- Other	100		
Other Costs			$2,853
- Salaries and Benefits (22 FTE)	$2,014		
- Rent, Utilities, etc.	163		
- Equipment, Travel, etc.	676		
		Total	**$4,288**

2015 Finance & Admin Baseline Assumptions

- The Exchange will hire an Internal Audit Manager as directed by the Audit and Compliance Committee of the Exchange Board.
  - Internal Auditor will receive knowledge transfer from the current Internal Audit vendor, Protiviti.
- The Legislature required the Exchange to have a Performance Audit performed by the State Auditor's Office (SAO) by no later than July 2016 and for the Exchange to pay for the costs. SAO estimated in 2013 that the costs would be approximately $735,000 to perform the audit.
- M&O costs will be required with acquisition of new Financial System that can meet the requirements and needs of the Exchange.
  - Current accounting package was not expected to be the primary book of record for all enrollee payment transactions
- Contracted with a vendor (BMI) to provide invoicing for Carrier Assessments is required due to HPF and current Financial System limitations.
- Currently Finance & Admin use 7 contractors. To curtail costs, Finance & Admin will have 2 contractors for contracting and assistance with Financial Operational activities/work in 2015.
- The Exchange assumes that a convenience fee will be charged for credit card payments or credits cards will not be accepted in an attempt to reduce the bank fees estimated to be $5 million in 2015 for such fees.

2015 Communications Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Marketing and Outreach			
- Media Buy - Exchange Marketing		GMMB	$1,000
Contracts			
- IPA/Navigators		Various	$1,200
Other Costs			$1,843
- Salaries and Benefits (17 FTE)	$1,581		
- Rent, Utilities, etc.	126		
- Equipment, Travel, etc.	136		
		Total	**$4,043**

2015 Communications Baseline Assumptions

- Assumes $1 million for Marketing and Outreach
  - Large media buys would take place in 2014 while Federal grant funds are still available
  - This level of funding would eliminate all advertising through TV, Radio or Print
- Assumes $1.2 million for IPA/Navigators
  - ACA requires to spend some dollars on IPA/Navigators
  - Distribution of these dollars will depend on strategic objectives. Options are:
    - Spread across all current IPA/Navigators
    - Large chunks of dollars to a few of the current IPA/Navigators
    - Ask for a Supplemental Federal Grant for the extended 2015 open enrollment to February 15, 2015
  - Funding for the 2014/2015 Open Enrollment (November 15, 2014 through February 15, 2015) will be provide by the current Federal grants.

2015 Policy Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Consulting			$157
- Actuarial	$50	Milliman	
- Consumer Rating System	50	TBD	
- Quality Assurance	7	NCQA	
- Consumer Survey	50	TBD	
Other Costs			$1,244
- Salaries and Benefits (10 FTE)	$1,090		
- Rent, Utilities, etc.	74		
- Equipment, Travel, etc.	80		
		Total	**$1,401**

2015 Policy Baseline Assumptions

Ongoing Actuarial Services (Milliman)

- Provide ongoing actuarial services, i.e. enrollment, premium tax and carrier assessment estimates
- Higher funding provides more analyses and more detailed estimates

Consumer Rating System (CRS) Consulting Services (NCQA, TBD)

- CRS required by state and federal law
- Board-approved and federally-required quality measures need to be collected and analyzed
- Higher funding provides more analysis and potential to add measures in the future

Consumer Survey (TBD)

- Required by federal law and provide necessary feedback to improve our services
- Higher funding allows for a more robust survey

2015 SHOP Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Consulting			$218
- Agent/Broker CSR	$145	Ciber	
- Agent/Broker CSR	73	Teksystems	
Other Costs			$1,151
- Salaries and Benefits (9 FTE)	$1,012		
- Rent, Utilities, etc.	67		
- Equipment, Travel, etc.	72		
		Total	**$1,369**

2015 SHOP Baseline Assumptions

- This level of funding provides for the bare minimum of support for brokers during 2015 open enrollment. It is estimated that call wait times will range from 12 to 20 minutes.
- Currently SHOP uses 6 contractors. To curtail costs, SHOP will only use 3 contractors for SHOP Operational activities/work in 2015.
- Customers have asked for additional staff from current levels to reduce wait times and to provide better support

Other Options Considered:

- Refer brokers to the Call Center (Faneuil)
- Take only employer and SHOP related calls
- Reduce staff hours or FTE or avoid backfilling when staff vacancy occurs

2015 Legal Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Legal Services			$200
- Presiding Officers (4)	$100	Various	
- Attorney General's Office	50	AGO	
- Outside Legal Counsel	50	TBD	
Other Costs			$776
- Salaries and Benefits (7 FTE)	$668		
- Rent, Utilities, etc.	52		
- Equipment, Travel, etc.	56		
		Total	**$976**

2015 Legal Baseline Assumptions

- The Legal Services director provides timely legal review and analysis as required by the management and staff of the Exchange
- The ACA and federal regulations require each Exchange to allow for eligibility appeals
- An appeal must be resolved within 90 days of receipt of appeal.
- Appeals must be heard and decisions rendered by a neutral decision maker. The Exchange contracts with Presiding Officers who perform that function for appeals
- With the use of State Funds (HBE Account – Fund 17T), the Exchange uses the services of the State Attorney General for legal advice as well as representation should it become involved in litigation
- Manages the Exchange's regulatory compliance program

2015 Executive Office Baseline Detail ($000's)

Deliverable Types	Breakout	Contractor	2015 Total
Consulting			
- Executive Consulting		TBD	$66
Other Costs			$759
- Salaries and Benefits (4 FTE)	$698		
- Rent, Utilities, etc.	30		
- Equipment, Travel, etc.	32		
		Total	**$825**

2015 Executive Office Baseline Assumptions

- FTE at 4
- Minimal consulting support

2015 Baseline Budget - Other Considerations

- Possible Level 1B supplemental request
- No cost extension for certain, grant related activities for Level 2 and Level 1B
- Medicaid cost allocation formula for 2015 being negotiated with HCA
- Timing: state fiscal year vs calendar year
- Communication plan

Communications Plan – Exchange Budget

- Engage with legislators and stakeholders on Exchange's FY 2015-17 budget.
- Raise awareness and provide updates.
- Explain funding priorities, current sources of funding & federal spending restrictions
- Understand stakeholder concerns and priorities
- Engage TACs, Advisory Committee, community partners, business
- Provide timely updates & communicate Board recommendations

Communication Plan – Key Dates

- June 18 – House Appropriations Committee
- June 26 – Board meeting
- July 17 – Joint Select Committee on Health Care Oversight
- July 24 – Board meeting – Budget recommendation
- August 28 – Board meeting
- Sept 18 and Nov 4 – Joint Select Committee meetings
- January 12 – Session begins

Washington Health Benefit Exchange

Appendix

2015 Draft Baseline Operating Plan and Budget

2015 Baseline Departmental FTE

2014 FTEs by Department	May Actual FTE	2014 Budgeted FTE	Variance	Variance %	2014/2015 FTE additions	2014/2015 FTE Decreases	2015 Projected FTE	2014 to 2015 Variance
IT	38	45	7	15.6%	0	-2	43	-2
Operations (NG)	27	34	7	20.6%	0	0	34	0
Finance & Admin	19	21	2	9.5%	1	0	22	1
Communications	16	17	1	5.9%	0	0	17	0
Policy	9	10	1	10.0%	0	0	10	0
Operations (SHOP)	7	9	2	22.2%	0	0	9	0
Legal	6	7	1	14.3%	0	0	7	0
Executive Office	3	4	1	25.0%	0	0	4	0
Total FTEs at month end	**125**	**147**	**22**	**15.0%**	**1**	**-2**	**146**	**-1**

The 2015 Budget assumes all positions will be filled by December 31, 2014.

	2014 to 2015 FTE Changes
IT	UAT Analyst (Project) - Reduction
	UAT Analyst (Project) - Reduction
Finance & Admin	Internal Audit Manager - Addition

2015 Baseline Departmental Contractors

2014 Contractors by Department	2014 Contractors as of June 1st	Projected 2015 Contractors	Variance	Variance %	Avg Monthly Cost
Executive Office	2	0	(2)	100.0%	$ 91,000
IT	31	0	(31)	100.0%	452,000
Operations (NG)	16	0	(16)	100.0%	399,000
Communications	0	0	0	0.0%	-
Policy	0	0	0	0.0%	-
Finance & Admin	7	2	(5)	71.4%	32,000
Operations (SHOP)	6	3	(3)	50.0%	48,000
Legal	0	0	0	0.0%	-
Total	**62**	**5**	**(57)**	**91.9%**	**$ 1,022,000**

The 2015 Budget assumes SHOP will use 3 contractors for the SHOP call center and Finance will use 2 contractors. One for the Contracting Manager and one to assist with the Financial Management System.

Note: Substantial business risk associated with effective and timely knowledge transfer to HBE staff during remainder of 2014.

Deloitte Maintenance & Operations Service

Infrastructure Services:

- Infrastructure services are HPF components such as servers, network components, firewalls, and databases. Infrastructure services are divided into the following categories:
  - Network Services/Server Management and Health Monitoring
  - License management/Certificate management
  - Disaster Recovery and Failover to Secondary site

Application Services

- Application services include details on support activities such as defect triaging, emergency fixes, status reporting, change management, and release management. Application services are divided into the following categories:
  - Release Planning and Management
  - Emergency Fixes/Data Corrections
  - Software Development Lifecycle (SDLC)
  - Conversion

Environment Services

- Environment services are those services that enable the maintenance of 10 separate environments in HPF to support development, testing, and production activities. Environment services include the following categories:
  - Build Management and Deployment: Application Software and Database
  - Executing and Monitoring Batch Jobs
  - Database Administration

IT Department Overview (43 FTE)

IT Leadership (7 FTE)

Technology Services (12 FTE)

- Security and QA
  - ✓ HPF security systems are maintained & performing as designed to meet all regulatory/business requirements
  - ✓ Ensure all processes and solution development follow industry best practices
- Development
  - ✓ Develop internal tools and applications
  - ✓ Support Deloitte in code reviews/troubleshooting—review all change requests of system design/solutions
- Architecture
  - ✓ Ensure all new solutions are compatible with existing system architecture
  - ✓ Collaborate with key partners (HCA, DSHS, etc.) to evaluate, design, implement and test cross-organizational solutions
- Technical Support and Analysis
  - ✓ Troubleshoot and analyze HPF issues
  - ✓ Provide technical support in supporting applications external to HPF
- Business Intelligence-qualitative/quantitative performance metrics & reports

Infrastructure Support (4 FTE)

- Infrastructure Support – Design, procure, implement all system infrastructure (data/voice network, servers, recovery, etc.)
- End-User Support – Procurement and support of end-user desktop, laptops, network access, back office solutions, etc.)
- Systems and Server Support – System support of all non-HPF applications and systems

Systems and Operations (18 FTE)

- Application Performance Capacity Mgmt/Change Control/System Communications/Usability Testing/IT Process Mgmt
- Documentation Mgmt/Incident Mgmt/Technical Analysis/UAT

Project Management Office (2 FTE)

- Issue/Risk Process Mgmt/PM Administration/Release Project Mgmt

2015 IT Baseline Menu Options

Deloitte M&O	2014 Base	2015 M&O
		4.50%
Estimated Base M&O Costs	$ 7,225,057	$ 7,550,185

Current Deloitte M&O is 9% of the total cost of the IT development

- Total HPF build cost estimate at year-end 2014 is $95M

Other M&O vendors and costs:

- Oracle – HPF Platform software
  - $1,100,000 per year – Newly signed contract (**contractually obligated**)
- eHealth – Plan Management software
  - $1,644,000 – Currently in negotiations to lower costs
- DSHS/ESA – Eligibility System
  - $1,300,000 – Current allocation amount based on usage. Currently working to update allocation distribution based on updated Medicaid and QHP client usage (**contractually obligated**)
- Akamai Tech – HPF Site Accelerator
  - $96,000 – Costs based on data utilized. Assume ongoing usage will mirror 2014 levels (**contractually obligated**)
- Microsoft – Professional Services Support
  - $150,000 – Assume ongoing usage and costs will mirror 2014 (**contractually obligated**)

Operations Department Overview (34 FTE)

Operations Leadership (5 FTE)

Client Specialists (7 FTE)
- Assist prospects/clients through complex eligibility & enrollment processes
- Manage client accounts, track problem resolution progress & provide follow-up with clients

Call Center/Triage (2 FTE)
- Technical assistance in developing call center operational procedures (scripts, workflow, etc.) and quality assurance program
- Triage customer problems and prioritize requests

Eligibility (3 FTE)
- Post-application reviews for conditional eligibility & special enrollment
- Troubleshoot erred applications, develop manual defect workarounds and provide training

Enrollment & Plan Management (4 FTE)
- Manage carrier relationships, enrollment & payment process, coordinate APTC & CSR payments from CMS to carriers
- Manage provider directory, load plan rates and benefit data, conduct carrier testing and onboarding readiness

Invoicing & Reconciliation (7 FTE)
- Responsible for invoice generation and issue resolution
- Reconcile EDI 834/820 files/carrier communications

Training, Sponsorship and Print/Translation (3 FTE)
- Development of system training materials, readiness and security training for Exchange employees and privileged users
- Develop business processes for sponsorship entities & functions, provide training
- Manage print contract, coordinate design and testing/Coordinate translations with experts/stakeholders for communication content

Data and Reporting (3 FTE)
- Manage business intelligence, assure data quality, prepare IRS & CMS reports, internal & external reports

2015 Operations Baseline Menu Options

Call Center Options

Option	Average # of CSR	Average Wait Times (in minutes)	Average Cost per Month	Annual Cost	Peak # of CSR	Low # of CSR	Other Costs	Total Cost	Comments
1	80	80	$ 434,467	$5,213,603	116	69	$ 488,399	$6,491,000	Overflow calls would
2	150	50	717,500	8,609,999	218	129	1,465,135	10,075,134	be billed by the
3	250	20	1,138,803	13,665,634	363	215	1,465,135	15,130,769	minute and could
4	350	5	1,556,811	18,681,735	508	301	1,465,135	20,146,870	increase estimate

Non-Federal Grant Printing & Postage Costs

Cost distribution of ESSB 6002 Printing Proviso

Current Estimate from K/P Corp	
Client	**Cost**
Medicaid - Shared	688,000
QHP - Shared	321,000
	1,009,000

Finance & Admin Department Overview (22 FTE)

Finance Leadership (7 FTE)

Grants Compliance and Reporting (2 FTE)

- Federal financial & regulatory grant compliance, reporting and monitoring services.

General Accounting, Internal Controls & Payroll (3 FTE)

- Payroll position is responsible for the administration of the company's time and attendance and payroll systems.
- Accounts Payable/Disbursements position analyzes all service invoices, bills or contracts for accuracy.
- General Ledger Accounting is responsible for providing and monitoring the timely and accurate recording of transactions in G/L.

Enrollee Payments and Issuer Payments - EDI Files (5 FTE)

- Issuer payments - reconcile and post payments received from enrollees via Key Pay & Lockbox 1 & 2.
- Refunds - refund enrollees for payments received but not valid.
- HPF Reconciliation - troubleshooting all check payment exceptions the lockbox process could not handle .
- Consumer payment processing - analyzing all payments sent to carriers (EDI 820 file).

Budget, Reporting & Internal Audit (2 FTE)

- Prepare financial & budget reports for the Operations Committee, Board, Health Care Authority (HCA), OFM and Legislative Staff.
- Responsible for internal control and compliance companywide.

Human Resources and Facilities (3 FTE):

- Design, development, and implementation of programs to ensure unified culture, motivated workforce for destination employer.
- Responsible for all facilities related matters and employee safety.

2015 Finance & Admin Baseline Menu Options

Options	Estimate Total Fee	HBE Impact	Consumer Impact	
HBE pays 100% of all fees	$ 5,500,000	$ 5,500,000	$ -	
HBE pays for ACH and 50% of Credit Card Fee	5,500,000	3,000,000	2,500,000	
HBE pays ACH Fee and consumer pays 100% of credit card fee	5,500,000	500,000	5,000,000	**

* HBE assumes the following in this estimate:

- 50% of clients will use credit cards
- Fee for credit processing from the bank will be 200 basis points.
- HBE will collect $500M in premiums

** HBE may elect not to offer the credit card option

2015 Communications Department Overview (17 FTE)

Communication Leadership (4 FTE)

Navigator/In-Person Assister Program and Navigator System Access and Troubleshooting (3 FTE)

- Management, oversight, technical assistance and support of 10 IPA Lead Organizations, 8 Outreach Partners, and 4 Tribes
- Represent Navigators/IPA interests in workgroups and committees, including collaboration with HCA, DSHS, and OIC
- Assure completion of all required documentation (security, confidentiality, etc.) for user access
- Respond to a Navigator mailbox for Lead Orgs requesting assistance with urgent medical or financial situation

Training and Certification (2 FTE)

- Administer a training and certification program for Navigators/IPAs in compliance with federal requirements
- Design, maintain, and use a learning management system (LMS) to track and administer the certification exam
- Complete federally required annual recertification process for all Navigators
- Establish and manage agreements with medical providers requesting certification of individuals as Certified Application Counselors (CACs) and oversee training, testing and certification of CACs

Healthplanfinder Business and Community Outreach and Support (3 FTE)

- Coordinate with GMMB on activities related to Exchange Business campaign
- Promote, participate in and collaborate in outreach events and activities of statewide partners, such as colleges, chambers of commerce, and business associations
- Develop and disseminate social media items; newsletter articles and other material
- Lead Health Literacy project
- Tribal outreach and marketing

Communications, Marketing and Advertising (5 FTE)

- Distribute press releases of timely WAHBE news including FAQs to inform customers, stakeholders and Customer Support network about businesses processes related to “hot issues”
- Publish monthly Washington Healthplanfinder News Today Newsletter to more than 12,000 consumers and stakeholders
- Creation of daily news reports and detailed monthly media recaps for staff and Board members
- Oversee the development and production of WAHBE advertising campaign and implement corporate partnerships
- Creation of WAHBE marketing collateral, including development of materials in eight essential languages
- Development of WAHBE business and industry reports
- Consumer usability testing

2015 Communications Baseline Menu Options

GMMB– Marketing and Outreach Options

$1 million

- Elimination of all radio, television, print and bulk of online advertising.
- Elimination of new and ongoing outreach materials, event and marketing participation (e.g. sponsorships, booths, etc.).

$3 million

- Provides dollars for paid advertising in designated channels
- Enables support of outreach materials, event and brand awareness activity

IPA Options

$1.2 million

- Lower enrollment and decrease in in-person assistance limited to hard to reach, vulnerable populations
- Elimination of lead organizations
- Centralization at HBE of communication, coordination, training-testing, Helpdesk, IT and telephone support for all Navigators
- No enrollment incentives

$3 million

- Higher enrollment in both Medicaid and QHP and in-person assistance available to general population
- Lead organizations coordinating services to hard-to-reach and vulnerable populations and targeted QHP groups
- Lead organizations providing communication, coordination, training-testing, Helpdesk, IT and telephone support for In-Person Assisters
- Limited enrollment incentives related to QHP enrollments

2015 Policy Department Overview (10 FTE)

Policy Leadership (2 FTE)

- Oversee Policy Team; provide policy and strategic guidance to the Board and Leadership Team; manage the Board and Committee meetings; serve as federal government liaison; oversee legislative and related stakeholder relationships

Legislative Affairs, Grants and Projects Coordination (2 FTE)

- Manage relationships with legislators, legislative staff and legislative stakeholders; track and analyze state legislation as it relates to the Exchange; develop communications on legislative issues
- Report and track programmatic grant activities; coordinate with Finance on grant spending; manage general reporting to CMS; support the enterprise-wide program management office in various activities

Policy Analysis (4 FTE)

- Provide analytical review of policy issues; review and summarize federal and state rules; lead policy analyses on emerging issues; provide policy technical assistance on design and development workgroups

Board and Committee Support (2 FTE)

- Coordinate meeting schedules; prepare meeting materials; communicate with Board members; manage Committee membership; arrange meeting logistics

2015 SHOP Departmental Overview (9 FTE)

SHOP Management (3 FTE)

- Direct department strategy, manage SHOP departmental operations and support SHOP team

Small Business Agent Representatives (4 FTE)

- Manage and support brokers and agents with HPF enrollment, outside sales for HPF, broker outreach, and establish sales strategy

Sr. Program Specialist (2 FTE)

- Support agent/broker program, training program and broker servicing, and support SHOP program operations and servicing

2015 SHOP Baseline Menu Options

Options	FTE	Contractors	Cost	HBE Impact
1 FTE & Contractors	9	3	$1,380,231	Respond and resolve, at a minimium level of service, broker technical issues related to HPF enrollment with HBE staff and contractors.
2 Full FTE	12	5	$1,840,157	Respond and resolve, at an average level of service, broker technical issues related to HPF enrollment with HBE staff.
3 Full FTE & Contractors	12	10	$2,022,157	Respond and resolve, at a desired level of service, broker technical issues related to HPF enrollment with HBE staff and contractors. Contractors would supplement FTE on a as needed basis.

2015 Legal Departmental Overview (7 FTE)

Legal and Regulatory Compliance (2 FTE)

- Provides legal analysis and advice and is the Exchange Compliance Officer
- Provides appeals, public records act and compliance analysis and research
- Provides administrative support for Legal Services

Appeals Program (5 FTE)

- Handle individual appeals including intake and final resolution by agreement, dismissal or final order.