Health Care Reform—HealthFlex Plan Sponsor Decision Supports

Executive Summary
The General Board of Pension and Health Benefits (General Board) is committed to providing HealthFlex plan sponsors with informative and detailed decision support tools (Toolkit) that plan sponsors can leverage in assessing the impact of Health Care Reform (the Affordable Care Act or ACA) on their participant population. Plan sponsors can use the tools as informative aids for decisions with respect to their population’s health care coverage.

The following is an outline of these supports.

I. Plan Sponsor Decision Support Toolkit
The “core” Toolkit will provide documents to help inform and guide the plan sponsor in assessing the impact of Health Care Reform (specifically the 2014 transition to “Exchanges”) on their population, including the following documents:

- **Executive Summary and Primer**—two documents highlighting the 2014 transition to Exchanges and other major market reforms; and the general impact, rules, etc. for plan sponsor consideration.
- **Population Analysis Model**—a population analysis spreadsheet that will be populated with plan sponsor-specific data—including clergy salary data from the General Board’s system, and health plan premium contribution share from the plan sponsor.
- **Planning Considerations Checklist**—to complement the model, the checklist will highlight various planning and decision-making considerations, including areas for plan sponsor refinement of model assumptions and the HealthFlex plan options that are anticipated to remain available, starting in 2014.
- **Frequently Asked Questions (FAQs)**

Additionally, beyond the core Toolkit documents, the General Board will look to develop the following pieces for plan sponsor use:

- **Sample communications**—to assist plan sponsors with communication of HCR impacts to their participant population, cover letter for sample “household income” survey questions, etc. (as need for plan sponsor consistency and continuity exist).
- **Sample “household income” survey questions**—including development of questions within Survey Monkey for plan sponsor use to assist plan sponsors in further refining data/assumptions used in the Population Analysis Model.

Please Note:
**Plan Sponsor Release Form (Required):** Prior to distribution of the core Toolkit, including plan sponsor’s specific Population Analysis Model, the plan sponsor will be required to execute a Release Form, in general acknowledging the illustrative and non-advisory nature of the Toolkit and “holding the General Board harmless” for plan sponsor decisions.

**Toolkit Availability:** The core Toolkit will be available by the end of September 2012.
II. **Small Group Consultations**

Generally, the General Board will conduct consultations with plan sponsors via web-conference or video-conference, depending on plan sponsor technological capabilities and preference. The General Board will provide *one Initial Population Analysis Consultation and one Follow-Up Population Analysis Consultation per plan sponsor*. It is important to note that a plan sponsor is required to complete an Initial Population Consultation Analysis as a condition of receiving a Toolkit; however, the plan sponsor will not be required to conduct a Follow-Up Consultation.

For the *Initial Consultation*, it is recommended that the plan sponsor audience be limited to maintain a “core” focus. Please refer to the “Initial Consultations Guidelines” document for meeting expectations, including pre- and post-consultation requirements for plan sponsor attendees. Additionally, all web/video-conferences will be recorded for Plan Sponsor access after the consultation.

**Consultation Availability**: The General Board will be able to support Initial Consultations starting in October 2012, with the intent for Initial Consultations to be completed during the fourth quarter 2012 and first quarter 2013.

For those plan sponsors desiring a *Follow-Up Consultation*, the plan sponsor audience can be larger than the Initial Consultation; however, it is recommended to include the Initial Consultation group and then limit additional attendees to a manageable number beyond that. Among other things, examples of who the audience may be will be included in the Follow-Up Consultation Guidelines (similar to the Initial Consultation Guidelines), which are under development and will be distributed at a later date.

III. **Other Supports**

In addition to the Toolkit and consultation supports outlined above, the General Board will look for additional methods to appropriately educate, inform and guide the plan sponsors. Potential examples include plan sponsor group calls/web-conferences, leveraging the March 2013 “Mini-Summit” (bumped up against the Conference Forum similar to March 2012) for larger group follow-up and individual plan sponsor/small group planning sessions, and possibly leveraging “regional meetings” arranged/hosted by a group of plan sponsors.