



CalOptima Health

FY 2025–2027
STRATEGIC PLAN

A Message From the CEO

At CalOptima Health, our members are at the heart of everything we do. As we embark on our FY 2025–2027 Strategic Plan, approved by our Board of Directors in February 2025, our team and community partners are inspired by the opportunity to serve Orange County residents with care that’s equitable, innovative and respectful of individual needs. This plan isn’t just a set of goals — it is our collective commitment to improving health outcomes for every member.

During the next three years, CalOptima Health will harness technology, strengthen partnerships and invest in our community to remove barriers to care and deliver measurable results. Whether we are expanding preventive services for our most vulnerable members or supporting our providers with enhanced tools and data, our focus is clear: better health for every member we serve.

With the guidance of our Board, the dedication of our staff and the trust of our members, CalOptima Health will bring our strategic priorities to life to strengthen the health of Orange County. Thank you for joining us on this journey. I look forward to the impact we will make as we aspire to be Better. Together.

A handwritten signature in black ink that reads "Michael Hunn". The signature is fluid and cursive, with the first name "Michael" and the last name "Hunn" clearly legible.

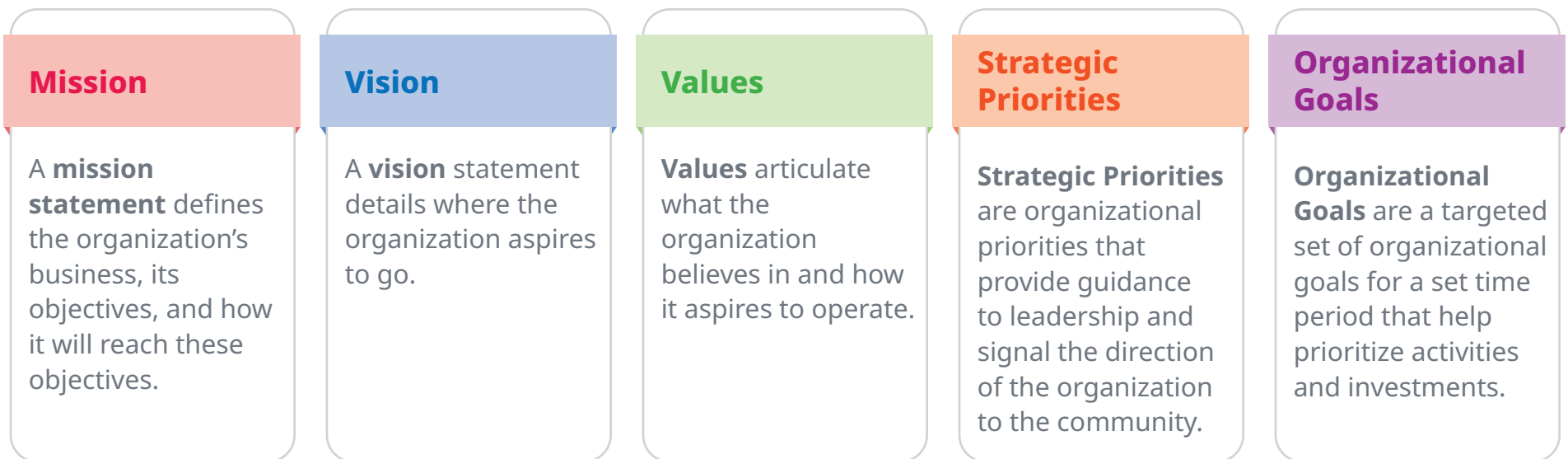
Michael Hunn

Introduction to the Strategic Plan

The health care system in Orange County is entering a period of significant change. Substantial policy changes at the federal and state levels present challenges that require a steadfast commitment to our mission and even greater collaboration and partnership across our community. In addition, persistent social issues like a lack of affordable housing, health care workforce shortages and ongoing disparities in access to care continue. At the same time, advancements in technology, growing awareness of social determinants of health and the pursuit of health equity offer powerful tools to transform how we serve our members.

For CalOptima Health, these dynamics underscore the urgency of our mission and vision and the need for a clear Strategic Plan. Our FY 2025–2027 Strategic Plan aims to position CalOptima Health to focus on what matters most — serving our members and strengthening our partnerships with providers and the community. We are seizing opportunities to drive better health outcomes, so every CalOptima Health member has the chance to live a healthier life.

Strategic Plan Components



CalOptima Health's Mission, Vision and Values



MISSION

To serve member health with excellence and dignity, respecting the value and needs of each person.



VISION

Provide all members with access to care and supports to achieve optimal health and well-being through an equitable and high-quality health care system.



VALUES

CalOptima Health C-A-R-E-S

We believe that to best serve the people of Orange County, we will lead with **Collaboration**, **Accountability**, **Respect**, **Excellence** and **Stewardship**.

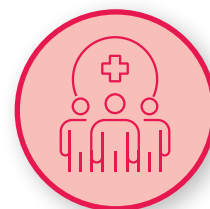
Strategic Priorities



Equity and
Population
Health



Quality
and Value



Community
Partnerships
and Investments



Operations,
Finance and
People



Equity and Population Health



CalOptima Health will infuse the pursuit of health equity throughout our work and will continue to innovate and develop tools and interventions that advance the physical, behavioral and social health of our members.

- 1.1** Utilize technology and innovation to strengthen health equity and population health management programs.
- 1.2** Implement a consistent model of care for population health and care management, including delegated networks.
- 1.3** Annually assess members' health and social needs and utilize data to inform targeted interventions.
- 1.4** Increase access to preventive services for vulnerable populations in pursuit of health equity.



“ In California, 75% of adults ages 19-64 on Medi-Cal live with at least one chronic condition, and nearly a third have three or more chronic conditions. Prevention is the foundation of health equity, and access is key to prevention. By proactively addressing health needs and expanding access, we can improve health outcomes for all our members. ”

—Michaela Silva Rose, DrPH, LCSW, Chief Health Equity Officer



Health Equity

The state in which everyone has a fair and just opportunity to attain their highest level of health.



Quality and Value



CalOptima Health is committed to providing the highest quality of physical, behavioral and social health care to our members and to ensuring sound stewardship of public dollars by achieving greater value.

- 2.1** Achieve NCQA rating of 4 Stars for Medi-Cal.
Achieve CMS rating of 3.5 Stars for Medicare.
- 2.2** Improve access to care by strengthening the delivery system through provider support and workforce initiatives.

- 2.3** Increase provider engagement through improved provider tools, data exchange and collaboration.
- 2.4** Expand the delivery of behavioral health services, invest in the workforce and drive quality improvement through innovation.



“*CalOptima Health is pursuing increased survivability of breast, cervical, colon and lung cancer through enhanced and early screening. After all, screening is about life, not cancer.*”

—Richard Pitts, D.O., Ph.D., Chief Medical Officer



CalOptima Health
allocates about
93 cents
of every dollar
toward member care.



Community Partnerships and Investments



CalOptima Health will continue to demonstrate our partnership with Orange County members, providers, county agencies and community organizations through Medi-Cal Transformation programs and robust community investments and partnerships to advance health equity.

- 3.1** Expand social health services through Medi-Cal Transformation programs and additional social needs.
- 3.2** Launch a comprehensive framework for community collaboration to co-create equitable solutions.
- 3.3** Prioritize community investments that advance health equity, drive prevention and improve access to care.
- 3.4** Ensure that all community investment programs include clear accountability metrics and regular performance monitoring requirements.



“Over the past few years, CalOptima Health has committed millions of dollars to building a community-based network of providers, including smaller, grassroots nonprofit organizations that provide essential services in some of our most under-resourced neighborhoods. It is our intention to continue building these partnerships across the county and growing our ability to connect to and serve members.”

—Kelly Bruno-Nelson, DSW, Executive Director, Medi-Cal/CalAIM



CalOptima Health will conduct a comprehensive **member and population health needs assessment**, including a community asset and resource study to inform health equity interventions, community investments, and strategic program development that best meet the whole-person health needs and preferences of our members.



Operations, Finance and People



CalOptima Health's continued investment in our performance and people are vital to ensuring the highest level of care and service to our members across their lifespan.

- 4.1 Improve the turnaround time for treatment authorizations for direct and delegated networks.
- 4.2 Improve the turnaround time for claims payment for direct and delegated networks.
- 4.3 Launch and grow new programs that take care of our members and their families across their lifespan.
- 4.4 Optimize the Medicare line of business to improve the member retention rate and support growth.
- 4.5 Implement the comprehensive Digital Transformation strategic roadmap.
- 4.6 Optimize member engagement functions to improve member retention, satisfaction and outcomes.
- 4.7 Achieve the Board approved ALR and ensure fiscal accountability and stewardship, including a balanced operating budget, quarterly budget reconciliation, and vendor and provider contracting.
- 4.8 Launch expanded employee development and retention efforts to drive employee engagement and advancement.



CalOptima Health aims to launch a Covered California plan on January 1, 2027.

“ CalOptima Health's effort to join Covered California reflects our unwavering commitment to ensuring continuity of care for our members. ”

—Yunkyung Kim, MPH, Chief Operating Officer

In March 2025, CalOptima Health held our first Staff Retreat to connect colleagues and deepen their understanding of the mission by sharing impactful stories from members and community partners.

About Our Leadership

CalOptima Health's leadership is united by a singular focus: delivering high-quality care and improving health outcomes for our members. Our success stems from the collective efforts of six dedicated groups, starting with our 10-member Board of Directors, which sets our strategic vision with the member at the center. The Board draws invaluable insights from four advisory committees — representing members, providers and community voices — ensuring our decisions reflect the real needs of those we serve. Together, they guide our executive team, which collaborates with staff to make CalOptima Health a leader in member-focused care.

Board of Directors

Isabel Becerra (Chair)
CEO, Coalition of Orange County
Community Health Centers

Vicente Sarmiento (Vice Chair)
Orange County Board of Supervisors,
Supervisor, Second District

Maura Byron
Member Representative

Doug Chaffee
Orange County Board of Supervisors,
Supervisor, Fourth District

Blair Contratto
Chief Strategy Officer,
Be Well OC

Norma García Guillén, J.D.
Attorney

Cathy Green
Registered Nurse

Brian Helleland
Chief Executive, Providence St. Joseph
Hospital and Providence Orange County &
High Desert

Veronica Kelley, DSW, LCSW
Agency Director, Orange County Health
Care Agency

José Mayorga, M.D.
Senior Vice President, Chief Quality Officer,
AltaMed Health Services

Janet Nguyen (Alternate)
Orange County Board of Supervisors,
Supervisor, First District

Executive Leadership

Michael Hunn
Chief Executive Officer

Veronica Carpenter
Chief Administrative Officer

Steve Eckberg
Chief Human Resources Officer

Nancy Huang
Chief Financial Officer

Yunkyung Kim
Chief Operating Officer

Kathleen Linder
Chief Information Officer

Richard Pitts, D.O., Ph.D.
Chief Medical Officer

Michael Silva Rose, DrPH, LCSW
Chief Health Equity Officer

John Tanner
Chief Compliance Officer

Zeinab Dabbah, M.D., J.D., MPH
Deputy Chief Medical Officer

Kelly Bruno-Nelson, DSW
Executive Director, Medi-Cal/CalAIM

Kelly Giardina
Executive Director, Clinical Operations

Michael Gomez
Executive Director, Network Operations

Marie Jeannis, RN, MSN, CCM
Executive Director, Equity and
Community Health

Carmen Katsarov, LPCC, CCM
Executive Director, Behavioral Health
Integration

Ladan Khamseh
Executive Director, Operations

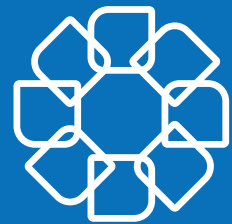
Donna Laverdiere
Executive Director, Strategic Development

Linda Lee, MPH
Executive Director, Quality

Eric Rustad
Executive Director, Finance

Javier Sanchez
Executive Director, Medicare Programs

Deanne Thompson
Executive Director, Marketing and
Communications



CalOptima Health

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