San Francisco: The Leading Center of Health, Healing and Hope

2014 San Francisco Health Sector Impact Report
The health care industry is a $28 billion economic engine that drives San Francisco. It employs 121,000 people, more than any other sector in the city. Nearly $5 billion will be spent to build five new hospitals before the decade is out. The city’s health sector serves as the epicenter of global innovation, with more than 100 biotechnology companies, bringing the region’s wizardry to bear on some of the most vexing medical problems known to humanity.

Even in this era of technological complexity, of stem cells and gene sequencing, San Francisco’s health sector knows its roots lie in making sure people enjoy the best health possible.

The health sector touches all of us, improving the quality of our lives. We need individuals, organizations, business leaders and elected officials to support, champion and invest in the improvements that advance the health of our city and our economy.

Join us as we continue to work together to keep San Francisco a leading center of health, healing and hope.

Caring for the Least Fortunate

The health sector has a long-standing tradition of working together to improve community health and provide care for the underserved and uninsured.

Overall charity care provided in San Francisco in 2012 was $291.7 million. In addition, hospitals contributed $279.5 million in subsidized care to Medi-Cal beneficiaries.

In 2013, San Francisco community hospitals provided more than $94 million in support of other programs, including health education, health prevention and early diagnosis services, as well as grants and in-kind services to community-based organizations serving vulnerable low-income residents.

Innovative programs bring health care to those most in need, including:

- The San Francisco Department of Public Health’s historic Healthy San Francisco program, the first health access program for the uninsured in the nation.
- PACE (Program of All-inclusive Care for the Elderly), the pioneering community-based system of care from On Lok Lifeways.
- The San Francisco Community Clinic Consortium’s Community Health Corps, which places people interested in health careers in a community health setting.
- Project Homeless Connect, in which more than 1,000 volunteers partner with government agencies, nonprofits, and the private sector to provide comprehensive health and human services for homeless San Franciscans.

Future Challenges

To meet our future challenges and opportunities, the health sector needs support from every level of our community.

The world of health care is rapidly changing. Technological advances increase our knowledge of diseases and how to treat them. The Affordable Care Act challenges the health sector to enhance the care delivery model. Shifting demographics alter the nature of the communities that need services. Economic conditions vary, sometimes throwing up roadblocks to the efficient delivery of health services.

With the support of a broad cross-section of our community, including the government, business and nonprofit arenas, we will meet these challenges head-on. By bringing everyone together, San Francisco’s health sector is making our city a global center of health, healing and hope.

Providing health services for all of San Francisco requires a wide array of entities, accomplishing a vast number of tasks.

San Francisco’s health sector is breathtakingly broad. It includes medical and mental health services, whether inpatient or outpatient, from a nurse, doctor or dentist, a physical therapist, pharmacist or EMT, or one of scores of other health care professionals. It also includes life sciences and medical research, insurance companies and health plans, pharmaceutical manufacturers and distributors, universities that train health professionals, innovators launching digital health companies, recreational organizations, health services provided by schools and community organizations, ambulance transport and paramedic services. A dynamic private marketplace complements the city’s comprehensive public health system.

A Major Economic Engine

An investment in the health sector is a wise investment in San Francisco’s economic vitality.

The health sector represents a major force in the economic life of San Francisco: Hospitals, health-related professors, life science research, health promotion schools, pharmaceutical and community-based health and wellness services and others generate $26.5 billion in spending annually (more than the gross state product of Vermont) while directly generating $12.6 billion jobs, about 20 percent of all jobs in San Francisco.

A healthy economy depends on a healthy community. The health sector ensures that San Francisco’s workforce remains productive by providing a wide array of treatment options for employees seeking medical, dental and related care for themselves and their families. Having easily accessible, world-class health services not only helps attract and retain people, it also draws businesses, which know their productivity depends on a healthy workforce.

In San Francisco, employment in the health sector grew 40 percent since 2000, other industries only grew 6.5 percent. The jobs range from entry-level technology, service and administrative roles to highly skilled research, therapy and clinical provider positions.

- San Francisco hospitals plans to spend $4.9 billion in building new facilities from 2015 to 2019, including UCSF Medical Center at Mission Bay, San Francisco General Hospital, Chinese Hospital, Kaiser Permanente medical offices and a new California Pacific Medical Center (CPMC) at Van Ness and Gray and a replacement hospital on CPMC’s St. Luke’s campus.
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A Tradition of Discovery and Innovation

The health sector has been discovering new and better ways to do things since the 1848 Gold Rush.

- San Francisco is the headquarters for California’s 85 million stem cell agency, the California Institute for Regenerative Medicine (CIRM). San Francisco research institutions have received nearly $280 million in CIRM grants to date.
- The San Francisco model of AIDS care has been replicated around the world. The model empowers treating patients with compassion and respect, providing an array of health and social services in one facility, and collaborating closely with government and community organizations. San Francisco General Hospital (SFGH) was the first hospital in the country to open its doors to AIDS patients. SFGH and other San Francisco providers continue to innovate in care and research today.
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A Broad and Complex Ecosystem

Coming Together In A Crisis

When an Asiana Airlines jet crashed at San Francisco International Airport in July 2013, victims were seen by every hospital in the city and some on the Peninsula; 182 patients were injured severely enough to be admitted. While San Francisco General Hospital and Trauma Center (SFGH) saw the most patients, and the most critically injured, the entire health sector pulled together in a way that had been prepared for.

Doctors, nurses and allied health care providers rushed to hospitals to treat victims, while bilingual staff translated. Hundreds of staff and volunteers at many organizations, including the San Francisco Department of Public Health, provided mental health counseling, interpreter services and assistance to locate loved ones, belongings, hotel rooms and transportation.

A region with as many people as the entire country every day—susceptible not just to plane crashes but also earthquakes and wildfires—loses the vital importance of maintaining a sophisticated health sector with a wide range of expertise. A healthy economy depends on a healthy community. The health sector ensures that San Francisco’s workforce remains productive by providing a wide array of treatment options for employees seeking medical, dental and related care for themselves and their families. Having easily accessible, world-class health services not only helps attract and retain people, it also draws businesses, which know their productivity depends on a healthy workforce.

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- Biomedical research within San Francisco is a $1.33 billion industry.
- Medical conferences brought 195,000 people to San Francisco in 2015. Their $27 million room nights account for 20 percent of the city’s total.
- In 2009, San Francisco was home to one biomedical research company. By 2014, 307 had started or moved to the city.

A Tradition of Discovery and Innovation

San Francisco is headquarters for California’s $3 billion stem cell agency, the California Institute for Regenerative Medicine (CIRM). San Francisco research institutions have received nearly $280 million in CIRM grants to date.

The San Francisco model of AIDS care has been replicated around the world. The model emphasizes treating patients with compassion and respect, providing an array of health and social services in one location, and collaborating closely with government and community organizations. San Francisco General Hospital (SFGH) was the first hospital in the country to open its doors to AIDS patients. SFGH and other San Francisco providers continue to innovate in care delivery and research.

San Francisco health care organizations have contributed many pioneering treatments:

- UCSF is one of the world’s leading health and science research universities. Its faculty boasts four Nobel laureates. Its researchers helped create the modern breast biopsy, made crucial breakthroughs in cancer and stem cell research and were the first to perform intrasellar tumor surgery, create an androgen gene into bacteria (leading to the mass production of steroids to treat diabetes), and discover that moving pulmonary surfactants cause the death of newborns with respiratory distress syndrome. UCSF also first developed a synthetic substitute for the neuropeptide, reducing infant deaths significantly.
- California Pacific Medical Center brought forth the first high-powered X-ray machine for the treatment of cancer in the West, the first iron lung west of the Mississippi, the first toe-to-hand transplant in the U.S., and the first heart transplant outside of a university research setting. It also was the first clinic in the nation to integrate homeopathy, acupuncture and more into a major medical center.
- Kaiser Permanente’s founding in 1938 launched one of the nation’s first nonprofit, integrated health care organizations, bringing together a health plan, hospital and physician groups to provide the full continuum of primary, specialty and community-based care, with a special emphasis on preventive care.
- Saint Francis Memorial Hospital had the first and largest hospital-based burn center in the West Coast, and offered the first hospital-based athletic injury treatment program in the valley.
- Mary’sMitchell Center combined the first lung replacement surgery in California, the first lung transplant outside of a university research setting. It also was the first clinic in the nation to integrate homeopathy, acupuncture and more into a major medical center.
- San Francisco General Hospital offered the first trauma brain injury program certified by the Joint Commission and the first Acute Care for Elders (ACE) geriatric inpatient unit in California.
- On Lok provided a national model for all-inclusive care for the elderly to enable senior citizens to live safely in their homes.

An economy in the life sciences sector can fuel growth and innovation, but whether aspirations like Rock Health or spinouts emerging from the academic world at QB3.

Coming Together in A Crisis

When an Airplane crash struck at San Francisco International Airport in July 2010, victims were seen by every hospital in the city and seen on the Peninsula. 102 patients were injured seriously enough to be admitted. While San Francisco General Hospital and Trauma Center (SFGH) saw the most patients, and the most critically injured, the entire health sector pulled together to respond. The burned center at Saint Francis Memorial Hospital stood ready for what could have been a major influx of injured. Doctors, nurses and allied health care providers rushed to hospitals to treat victims, while bilingual staff translated. Hundreds of staff and volunteers at many organizations, including the San Francisco Department of Public Health, provided mental health counseling, interpreter services and assistance to locate loved ones, belongings, hotel rooms and transportation.

A region with so many people on the move every day—susceptible not just to plane crashes but also earthquakes and wildfires—knows the vital importance of maintaining a sophisticated health sector with a wide range of expertise.

In 2003, San Francisco was home to one biomedical research company. By 2014, 307 had started or moved to the city.

A health system has been discovering new and better ways to do things since the 1848 Gold Rush. Its faculty boasts four Nobel laureates. Its researchers helped create the modern breast biopsy, made crucial breakthroughs in cancer and stem cell research and were the first to perform intrasellar tumor surgery, create an androgen gene into bacteria (leading to the mass production of steroids to treat diabetes), and discover that moving pulmonary surfactants cause the death of newborns with respiratory distress syndrome. UCSF also first developed a synthetic substitute for the neuropeptide, reducing infant deaths significantly.

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A Broad and Complex Ecosystem

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A Major Economic Engine

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A healthy economy depends on a healthy community. The health sector ensures that San Francisco’s workforce remains productive by providing a wide array of treatment options for employees seeking medical, dental and related care for themselves and their families. When easily accessible, world-class health services not only helps attract and retain people, it also drives businesses, which know their productivity depends on a healthy workforce.

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- Biomedical research within San Francisco is a $15 billion industry.
- Medical conferences brought 195,000 people to San Francisco in 2015.
- Three $27 million room signs account for 20 percent of the city’s total.
- In 2009, San Francisco was home to one biotech research company. By 2014, 397 had started or moved to the city.
- San Francisco health care organizations have contributed many pioneering treatments:
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  - Mary Hall Regional Center continued the first hip replacement surgery in California; was the first hospital in the U.S. to perform a balloon angioplasty procedure and offered the first program for AIDS-related dementia.
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A Tradition of Discovery and Innovation

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- San Francisco is headquarters for California’s $3 billion stem cell agency, the California Institute for Regenerative Medicine (CIRM). San Francisco research institutions have received nearly $260 million in CIRM grants to date.
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