A Tradition of Caring

From the earliest days of the Gold Rush, as San Francisco grew into a boom town and then a bona fide city, hospitals and clinics opened to care for the sick and the injured. Even in that rough and tumble era, a health care industry emerged, spurred on both by need and by an entrepreneurial spirit that thrives today. Just as people sought to discover new means of wealth in those California hillsides, innovators pushed to improve the care of people.
More than 160 years later, the health care industry is a $28 billion economic engine that drives San Francisco. It employs 121,000 people, more than any other sector, and about 20 percent of the city’s workforce. Nearly $5 billion will be spent to build five new hospitals before this decade is over. San Francisco boasts an explosion of more than 100 biotechnology companies, bringing the region’s genius to bear on some of the most vexing medical problems known to humanity. The city’s health sector serves as the epicenter of global innovation, where advanced science is translated into innovative care that ultimately improves health worldwide.

Yet even in this era of technological complexity, of regenerating stem cells and gene sequencing, of major economic impacts, San Francisco’s health sector has not forgotten its roots. Just as in California’s earliest days, care providers are focused on making sure people can enjoy the best health possible. The vast array of activities and investments that constitute our dynamic, modern health sector provide a necessary foundation that allows the community to thrive and improves the quality of life for all San Franciscans.

This report will give you a sense of the vast range and complexity of San Francisco’s health sector, which extends from neighborhood clinics to major university research hospitals, from innovative insurers to Nobel Prize winners, from the hygienist who cleans your teeth to the emergency medical technicians who will rescue us when the next big earthquake hits. You will see the impact the health sector has on the economy and life of San Franciscans, including the extent to which a healthy economy depends on a healthy community. And we will examine the future challenges and opportunities facing the health sector, and what it means for the broader community.

The health sector is an essential part of the city’s infrastructure and helps keep our community healthy, vibrant and growing. San Francisco’s health sector is making our city a global center of health, healing and hope. We all benefit from a strong health sector.

SAN FRANCISCO STORIES: Working Together for Our Tiniest Patients

Cecilia Licon is not a doctor. But she knew that seeing blood in her urine 24 weeks into her pregnancy meant something was very wrong.

“Bleeding is a sign that the placental lining might be peeling away from the uterus,” says Christopher Retajczyk, MD, medical director of the neonatal intensive care unit at Sutter Medical Center in Santa Rosa.

It could mean a premature birth is imminent. Because Cecilia was still so early in her pregnancy, doctors in Santa Rosa transferred her to Sutter Health’s California Pacific Medical Center (CPMC) in San Francisco, which has additional specialists and equipment to care for “micro-preemies” born at less than 26 weeks.

Cecilia began receiving corticosteroids to prevent problems related to prematurity. Two weeks later, doctors performed a Caesarean section and delivered baby Pablo.

Babies born at 24 weeks are incredibly fragile. Skin is only cells deep, and the breathing machine necessary to support the baby can also damage its lungs. By coming to CPMC early, Pablo had 14 extra days in the womb, enough time for the steroids to strengthen his lungs, and he was able to use a less invasive breathing machine.

Thanks to the specialized care he received, Pablo was strong enough to return to the Santa Rosa hospital closer to home only 19 days after his birth. Pablo went home two months later. He is doing well and continues to grow.

“I call him my miracle baby,” Cecilia says.
Providing health services for all of San Francisco requires a wide array of interconnected entities, accomplishing a vast number of tasks, from discovering new therapies in a lab to making sure patients receive the care they need and paying for it.

It would be difficult to overstate the breadth of the health sector in a city like San Francisco. Before understanding the impact the sector has, either on the city’s economy or on the health of its residents, it’s important to grasp the wide range of expertise that the sector encompasses, carried out by both public and private contributors.

The health sector includes:

1. **Health care services.** The broadest area within the health sector, and the first one that average residents think of, includes virtually every way a patient is directly affected by a provider, including:

   **Inpatient and emergency services,** including physical, mental and oral health care issues, at one of the city’s many outstanding hospitals, including California Pacific Medical Center, Chinese Hospital, Jewish Home of San Francisco, Kaiser Permanente San Francisco, Laguna Honda Hospital and Rehabilitation Center, San Francisco General Hospital and Trauma Center, Saint Francis Memorial Hospital, St. Mary’s Medical Center, UCSF Benioff Children’s Hospital and VA Medical Center.

   **Outpatient services,** such as physical therapy, occupational therapy, speech therapy, mental health counseling, lab testing, imaging, pharmacy, dialysis, blood bank and more. Outpatient services also include community pharmacies that are now often part of retail stores.

   **Community clinics and consortiums,** as well as hospital-based specialty services and clinics, often serving those who can least afford health care.

   **Post-acute care services,** such as skilled nursing services, home health, durable medical equipment, assisted living, respite care, in-home support, adult day care, board and care, hospice and long-term care services.

   **Health insurance plans,** such as Blue Shield, Kaiser Permanente and Chinese Community Health Plan.

   **Individual providers,** such as private practice doctors, dentists, nurses, pharmacists, optometrists, marriage and family therapists, licensed clinical social workers, psychologists and many others.

### 2013 Wages and Salaries for Health Care Professionals Employed in San Francisco

A look at the economic data reveals a wide range of jobs in the health sector, paying a wide range of salaries depending on education and experience.

<table>
<thead>
<tr>
<th>Occupation Title</th>
<th>Hourly Wage</th>
<th>Annual Mean Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Occupations</td>
<td>$32.41</td>
<td>$67,410</td>
</tr>
<tr>
<td>Healthcare Occupations</td>
<td>$42.62</td>
<td>$88,654</td>
</tr>
<tr>
<td>Cardiovascular Technologists &amp; Technicians</td>
<td>$36.52</td>
<td>$75,970</td>
</tr>
<tr>
<td>Chiropractors</td>
<td>$24.12</td>
<td>$50,170</td>
</tr>
<tr>
<td>Dental Assistants &amp; Hygienists</td>
<td>$23.49-54.31</td>
<td>$48,870-112,970</td>
</tr>
<tr>
<td>Dentists, all types</td>
<td>$79.51-84.09</td>
<td>$165,380-174,920</td>
</tr>
<tr>
<td>Dietitians, Nutritionists &amp; Technicians</td>
<td>$20.40-37.45</td>
<td>$42,440-77,890</td>
</tr>
<tr>
<td>Emergency Medical Technicians &amp; Paramedics</td>
<td>$27.26</td>
<td>$56,690</td>
</tr>
<tr>
<td>Genetic Counselors</td>
<td>$42.50</td>
<td>$88,400</td>
</tr>
<tr>
<td>Home Health Aides</td>
<td>$31.64</td>
<td>$62,370</td>
</tr>
<tr>
<td>Imaging technologists: ultrasound, nuclear medicine, MRI</td>
<td>$40.75-56.48</td>
<td>$84,770-117,470</td>
</tr>
<tr>
<td>Licensed Practical &amp; Licensed Vocational Nurses</td>
<td>$29.97</td>
<td>$56,240</td>
</tr>
<tr>
<td>Massage Therapists</td>
<td>$21.75</td>
<td>$45,240</td>
</tr>
<tr>
<td>Medical &amp; Clinical Laboratory Technicians &amp; Technologists</td>
<td>$27.04-43.53</td>
<td>$56,250-90,530</td>
</tr>
<tr>
<td>Medical Records &amp; Health Information Technicians</td>
<td>$25.83</td>
<td>$53,730</td>
</tr>
<tr>
<td>Nursing Assistants, Medical Assistants, Orderlies</td>
<td>$20.10-21.00</td>
<td>$41,810-43,680</td>
</tr>
<tr>
<td>Occupational Health &amp; Safety Technicians &amp; Specialists</td>
<td>$31.87-46.81</td>
<td>$66,280-97,360</td>
</tr>
<tr>
<td>Opticians, Dispensing</td>
<td>$18.08</td>
<td>$37,610</td>
</tr>
<tr>
<td>Pharmacists</td>
<td>$65.41</td>
<td>$136,060</td>
</tr>
<tr>
<td>Pharmacy Aides &amp; Technicians</td>
<td>$13.57-22.01</td>
<td>$28,230-45,790</td>
</tr>
<tr>
<td>Phlebotomists</td>
<td>$20.27</td>
<td>$42,160</td>
</tr>
<tr>
<td>Physical Therapist Aides &amp; Assistants</td>
<td>$32.65-49.25</td>
<td>$67,900-102,450</td>
</tr>
<tr>
<td>Physicians &amp; Surgeons</td>
<td>$69.97-111.73</td>
<td>$196,080</td>
</tr>
<tr>
<td>Physician Assistants</td>
<td>$53.64</td>
<td>$111,570</td>
</tr>
<tr>
<td>Podiatrists</td>
<td>$59.64</td>
<td>$124,050</td>
</tr>
<tr>
<td>Psychiatric Technicians</td>
<td>$26.57</td>
<td>$55,270</td>
</tr>
<tr>
<td>Registered Nurse Anesthetists</td>
<td>$75.60</td>
<td>$157,260</td>
</tr>
<tr>
<td>Registered Nurse Practitioners</td>
<td>$60.44</td>
<td>$125,720</td>
</tr>
<tr>
<td>Registered Nurses</td>
<td>$61.38</td>
<td>$127,670</td>
</tr>
<tr>
<td>Respiratory Therapists</td>
<td>$43.38</td>
<td>$90,230</td>
</tr>
<tr>
<td>Surgical Technologists</td>
<td>$31.21</td>
<td>$64,910</td>
</tr>
<tr>
<td>Veterinarians</td>
<td>$75.27</td>
<td>$156,560</td>
</tr>
</tbody>
</table>

(Source: CA Employment Development Department and U.S. Bureau of Labor Statistics)
2. **Life sciences and medical research.** From groundbreaking research done at hospitals and universities, to pioneers pushing the envelope at biotechnology companies. San Francisco is home to scores of laboratories looking for causes and cures, testing new treatments and inventing new devices and delivery models.

3. **Pharmaceutical companies.** Major manufacturers like Pfizer, the Roche Group and Bayer have established outposts in San Francisco. McKesson, the largest pharmaceutical distributor in North America—delivering one-third of all medications used every day—has its headquarters here.

4. **Digital health care.** health IT and mobile health care firms. Innovators in this new wave include Omada Health, which makes digital health therapy programs for people with diabetes and other chronic but potentially treatable issues, and Welkin Health, which makes a mobile app that connects patients with type 2 diabetes with certified diabetes educators. Those and other companies received funding from San Francisco accelerator Rock Health, a linchpin in making a mobile app that connects patients with type 2 diabetes with certified diabetes educators. Those and other companies received funding from San Francisco accelerator Rock Health, a linchpin in the venture capital community.

5. **Health professions training.** UC San Francisco’s schools of dentistry, medicine, nursing and pharmacy and Graduate Division are considered among the nation’s top in their fields. UCSF health care professionals train at San Francisco General Hospital and Trauma Center, the VA Medical Center San Francisco, Kaiser Permanente, St. Mary’s and UCSF Medical Center, demonstrating the strong partnerships that make the city a cultivator of good care. San Francisco is also home to other universities and colleges that train health professionals including: San Francisco State University, which offers courses preparing students for careers in health, as well as post-bachelor programs in nursing and dentistry; the City College of San Francisco, which offers certificates and associate’s degrees in a range of health fields, including paramedic, medical office assistant, pharmacy technician, and specialties in HIV, prison health and many other areas; and the University of San Francisco, which offers bachelor’s degrees in nursing and health services, as well as master’s and doctoral programs in nursing, mental health, behavioral health and other fields.

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**McKesson Makes Its Home Here**

When you think of health care in San Francisco, you might think of specific hospitals or clinics, or groundbreaking research. You might not think of McKesson—but you should. McKesson is the oldest and largest health care services company in the country, and ranks 15th on the Fortune 500.

Founded in 1833 in New York, McKesson later moved its headquarters here in 1970. It employs nearly 1,200 people at three locations in the city, and 38,000 people worldwide. Its products touch the lives of 100 million patients, and its online sales exceed that of eBay and Amazon combined.

Not only is McKesson a pharmaceutical and medical supply distribution powerhouse, but its software and services are used by 96 percent of private health plans, and more than half of all U.S. hospitals.

Its business and commitment to affordable care helps support San Francisco’s health care system, often anonymously to the end user. It is the sole distributor for the Vaccines for Children program, which the U.S. Centers for Disease Control and Prevention runs to provide free vaccines to poor children; more than 50 hospitals, clinics and practitioners in San Francisco participate in this program.

McKesson also distributes pharmaceuticals to North East Medical Services, a nonprofit with five clinics for underserved people in San Francisco; the VA Medical Center San Francisco; and the City and County of San Francisco, including San Francisco General Hospital and Trauma Center, the Behavioral Health Department, Laguna Honda and the city’s clinics and jails.

In addition, Kaiser Permanente San Francisco established a tradition of teaching excellence 60 years ago with the development of its own sponsored residency programs. Today, Kaiser Permanente hosts more than 270 residents per year, who train in one of 14 specialties, with teaching partnerships including St. Mary’s Hospital, UCSF, California Pacific Medical Center, and VA Medical Center San Francisco.

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6. **Community recreational organizations**, such as health clubs, parks and recreation facilities, intramural sports leagues, wellness services, preventive care, health education, nutrition, fitness centers, gyms and many other places where people get healthy and stay healthy.

7. **Community-based services** to support healthy people and communities, such as Planned Parenthood, YMCA, Jewish Community Center, San Francisco Senior Center, Glide Health Services, Shanti Project, Delancey Street Foundation, Women’s Community Clinic, the Tenderloin AIDS Resource Center and many more.

8. **School-based health services**, which are often on the front lines of keeping San Francisco’s youth healthy.

9. **Ambulance transport**, both public (as part of the San Francisco Fire Department) and private.

10. **Paratransit** for disabled residents.
An investment in the health sector is a wise investment in San Francisco’s economic vitality.

With its impact extending to everyone’s life, from conception to end of life, the health sector represents a major force in the economic strength of San Francisco. Hospitals, health-related professions, life science research, health profession schools, pharmaceutical and community-based health and wellness services and others generate $28.4 billion in spending annually while directly generating 121,677 jobs, about 20 percent of all jobs in San Francisco. For perspective, consider that the $28.4 billion surpasses the gross state product of Vermont.

2014 Economic Impact of the San Francisco Health Sector

<table>
<thead>
<tr>
<th>Impact Type</th>
<th>Employment</th>
<th>Labor Income</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct Effect</td>
<td>121,667</td>
<td>$9,636,046,138</td>
<td>$17,215,880,965</td>
</tr>
<tr>
<td>Indirect Effect</td>
<td>23,994</td>
<td>$2,077,086,127</td>
<td>$4,756,526,222</td>
</tr>
<tr>
<td>Induced Effect</td>
<td>39,232</td>
<td>$2,679,180,109</td>
<td>$6,458,386,297</td>
</tr>
<tr>
<td>Total Effect</td>
<td>184,893</td>
<td>$14,392,312,373</td>
<td>$28,430,793,484</td>
</tr>
</tbody>
</table>

The health sector employs more people than any other sector; it outpaces government employment even after accounting for jobs that are in both government (federal, state and local) and the health sector, such as those with the city’s Department of Public Health (5,041 jobs overlap).

Job totals for 2013:
- Health sector, including government: 121,677.
- Government, including health: 95,041.
- Tourism: 76,854.
- Technology: 53,519.

Other highlights include:
1. In San Francisco, employment in the health sector grew 40 percent since 2000; by comparison, other industries only grew 6.5 percent.
2. The health sector generates a wide range of jobs from entry-level technology, service and administrative roles to highly skilled research, therapy, and clinical provider positions. Because these jobs pay well, more people want to establish careers in the health field, which will help serve an increasingly aging population.
3. Hospitals in San Francisco are planning to spend $4.9 billion in new building construction from 2015 to 2019. Five replacement hospitals and a medical office building are currently under construction in the city:
   - California Pacific Medical Center will open its new 274-bed medical center at Van Ness and Geary and a 120-bed replacement hospital on the St. Luke’s campus in 2019. The community investment for both projects...
is a reported $2.7 billion. The new Van Ness and Geary campus, on the site of the former Cathedral Hill Hotel (known to old-timers as the Jack Tar), will include a 740,000-square-foot hospital, a nine-story, 253,000-square-foot medical office building, and underground parking space.

- UCSF Medical Center at Mission Bay, a huge $1.52 billion, 878,000-square-foot LEED gold certified complex including hospitals for women, children and cancer patients with a total of 289 beds, will open in February 2015. Located alongside UCSF’s world-renowned research campus, the new medical center will further encourage the translation of laboratory discoveries into next-generation therapies.

- A new San Francisco General Hospital and Trauma Center will open in 2015, with expanded acute beds, a larger emergency room and the most seismic-resistant design known today. The 453,000-square-foot, LEED gold certified hospital cost $887.4 million to build, using money approved by voters in 2008 by an 84 percent margin.

- Chinese Hospital will open its new $160 million facility in 2016. The 101,000-square-foot tower will include a new 22-bed skilled nursing unit, three larger operating rooms and an expanded emergency room.

- Kaiser Permanente will open a 220,000-square-foot LEED gold certified medical office building in Mission Bay in 2016, supplementing services offered at its longtime Geary Boulevard location. In addition to Laboratory, Optometry, and Physical Therapy services, there will also be Internal Medicine, Minor Injury, Ob-Gyn, Pediatrics, Imaging, Health Education, Pharmacy, and Orthopedics clinics.

4. In 2003, San Francisco was home to one biomedical research company. By 2014, 107 had started in or moved to San Francisco, thanks largely to the city’s establishment of Mission Bay as a biotechnology magnet.

5. Biomedical research within San Francisco is a $1.33 billion industry, $618 million of which is funded by the National Institutes of Health. UCSF is the top public recipient of NIH grants, with more than $517 million awarded in 2013. Through a more than century old partnership, UCSF researchers also work and practice at SFGH, where $111 million in research benefitting vulnerable populations was conducted in 2013.

6. Medical conferences brought 195,000 people to San Francisco in 2013. They paid for more than 527,000 room nights, accounting for 20 percent of the city’s total.

| Industries Most Affected by 2014 Health Sector Spending in San Francisco |
|---------------------------------|-----------------|-----------------|-----------------|
| Description                                 | Employment | Labor Income | Output          |
| Private hospitals                | 35,548     | $3,653,725,172 | $6,463,859,911  |
| Offices of physicians, dentists, and other health practitioners | 24,631     | $1,813,208,570 | $3,159,465,442  |
| Private junior colleges, colleges, universities, and professional schools | 21,734     | $1,085,249,092 | $2,276,902,752  |
| State & local government education and payroll only | 10,649     | $832,676,897  | $1,595,255,142  |
| Retail Stores - Health and personal care | 10,625     | $670,900,054  | $1,082,370,083  |
| Nursing and residential care facilities | 9,596      | $473,252,965  | $776,739,480    |
| Food services and restaurants      | 6,459      | $208,594,650  | $482,519,925    |
| Real estate establishments         | 6,399      | $288,342,363  | $1,487,658,834  |
| Construction of new nonresidential commercial and health care structures | 5,083      | $450,582,550  | $997,980,609    |
| Home health care services          | 3,954      | $213,750,683  | $301,276,423    |
A healthy economy depends on a healthy community.

San Francisco attracts and retains a skilled workforce by providing a great quality of life that includes abundant recreational, cultural and entertainment activities, highly regarded schools and universities, diverse faith-based organizations and internationally acclaimed health care facilities.

Health care plays a significant role in keeping this workforce productive by providing a wide array of treatment options for employees seeking medical, dental, mental health 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 to the city, because employers know their bottom line depends on a healthy workforce.

As a part of the business landscape in San Francisco, home to cutting-edge research and innovation, the health sector contributes to the overall economy by bringing in millions of dollars in research and grant funding and contributions from donors and venture capitalists. Our highly ranked universities and academic medical centers train doctors, nurses, surgeons, dentists, scientists, pharmacists, physical therapists and other allied health professionals, thus ensuring a pipeline of future leaders in their fields.
Through partnerships with labor, educational institutions and community-based hiring partners, the health care sector creates opportunities through workforce development programs in engineering, construction, nursing, allied health professions and clinical laboratory science, as well as entry-level service and administrative positions.

Community-based health sector organizations support aging-in-place so older adults can continue to live in their own homes and communities as long as possible, in turn supporting businesses and contributing to the economy.

**Kaiser Permanente: Making Health An Easy Choice**

In San Francisco’s Bayview neighborhood, 46 percent of adults and 39 percent of children are overweight or obese, putting them at higher risk for a variety of preventable health conditions including diabetes and hypertension. Kaiser Permanente has provided $1 million to help establish the Bayview Healthy Eating Active Living (HEAL) Zone.

The HEAL Zone brings together a network of community organizations and local residents with the goal of creating environments that help people eat better and move more as part of daily life. The Zone increases access to healthy food and safe places to be active, enabling 10,000 people living in the Bayview to make healthy choices.

One example of the HEAL Zone’s impact is the transformation of three local markets: Ford’s, Kennedy’s and Lee’s. Until recently, the neighborhood corner stores were known for being hubs of processed foods, soda, tobacco and alcohol. After more than a year of planning and help from the Food Guardians, a grassroots group in the Bayview, the three markets now work with local suppliers to offer and prominently display fresh fruits and vegetables.

As a result of the healthy retail conversions and other HEAL Zone efforts:

- 3,000 pieces of produce are sold monthly at Lee’s Market.
- Four additional stores have improved healthy offerings, benefiting hundreds of residents.
- More than 200 residents attended the Bayview HEAL Zone kick-off event at Bayview Park and Martin Luther King Jr. Pool, where they enjoyed Zumba, swimming and healthy food.
- 245 students are working with a physical education specialist at Carver elementary school.
- 150 students participated in the 2013 Walk to School Day.
- 25 students participate in a semi-weekly baseball class at Bayview Park.

Kaiser Permanente supports HEAL Zones throughout California as part of its efforts to promote health equity in communities that have high rates of poverty and chronic health conditions.

**SAN FRANCISCO STORIES: Paul Takes Charge of His Health**

Paul is a 49-year-old patient in the General Medicine Clinic (GMC) at San Francisco General Hospital and Trauma Center. In just one year, he was admitted to the hospital three times and spent 23 days in the hospital because of serious medical issues including congestive heart failure, severe coronary artery disease and difficulty breathing due to a blockage to the main artery of the lung. In addition, Paul was actively using methamphetamines and was diagnosed with depression. Paul was not able to manage his complex medical conditions, was not taking his medications regularly and frequently missed his scheduled doctor appointments.

A small number of patients like Paul account for a disproportionate amount of hospital admissions—2.7 percent of patients who accounted for 35 percent of hospital admissions from that clinic—and the GMC was determined to do something about it.

In 2012, the GMC started a new Care Management Program focusing on patients with complex medical, psychological and social conditions to improve their health and reduce hospital admissions, thereby reducing the cost of care and improving patient satisfaction.

Paul began working with a team of providers, including a physician, a nurse, a health coach and a social worker. “We focused on building a relationship with Paul and his family,” said Fern Ebeling, Nurse Complex Care Manager. Ebeling and a health coach performed a comprehensive assessment, including an in-home visit.

“He was initially hesitant about working with our team, but after three months of intensive involvement, he began to engage,” Ebeling said. “He now feels comfortable calling us with his concerns.”

During the first four months, the Care Management Team had 43 conversations with Paul and his family and six in-person visits. Paul began taking his medications regularly and attending all of his clinic appointments. His health improved and he required less frequent coaching. After a few months, his primary care provider said, “This is the first time I have seen him stable, and he looks like a different person!” Paul has had no emergency room visits or hospital admissions under the program.

Forty-five patients enrolled in the Care Management Program during its first year. On average, patients enrolled for six months or longer have spent 59 percent fewer days in the hospital and had 55 percent fewer Emergency Room visits—a victory for everyone.
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 has been a global leader in research and innovative care delivery, with many of its discoveries not only having a worldwide impact, but also improving the lives of people at home. In at least two important instances, several of the city’s leading institutions collaborate, with their combined efforts leading to even greater results:

- San Francisco is headquarters for California’s stem cell agency, the California Institute for Regenerative Medicine (CIRM). In 2004, 59 percent of California voters approved a measure to raise $3 billion in bonds over 10 years to fund stem cell research, recognizing the importance of this new science in discovering cures for many of humanity’s most pernicious diseases, as well as the lack of federal funding in this area. CIRM closely monitors progress in stem cell research and targets funding in areas most likely to lead to new therapies. It funds cutting-edge research, trains new scientists and works with industry leaders to make sure its grantees succeed—and that the people of California benefit. In San Francisco, UCSF has received 55 grants, totaling more than $132 million, and the Gladstone Institutes have received 27 grants totaling nearly $52 million. San Francisco State University received a grant of nearly $3.6 million, and City College of San Francisco received a grant of nearly $2.5 million.

- The San Francisco model of AIDS care has been replicated around the world. It stands as a testament to a community-wide response that would see the first AIDS inpatient and outpatient clinics in the country open at San Francisco General Hospital and Trauma Center, as well as new treatments that have made AIDS a manageable disease and that give hope for a cure for the first time since the epidemic emerged in the early 1980s. At that time, the primary patient population getting the disease—gay men—was already the target of significant discrimination, including in the health field. In addition, many of the patients were struggling with serious socio-economic issues in addition to their HIV. In response to those needs, teams of doctors, working alongside city nurse practitioners, nurses, social workers and other care providers, developed the San Francisco model, which emphasized treating patients with compassion and respect; providing an array of health and social services in one facility; and collaborating closely with the San Francisco Department of Public Health and local community organizations. San Francisco hospitals continue to innovate AIDS care today. ¹

Many San Francisco health institutions have developed innovations that have contributed to the health of people around the world, nation and state. Of particular note, UCSF is one of the world’s leading health and science research universities, and is responsible for many innovations and discoveries that have impacted health care worldwide. The mavericks who discovered proto-oncogenes, normal genes that can be converted to cancer by genetic damage, prions, an infectious agent that causes neurodegenerative diseases, and recombinant DNA—birthing the modern biotech industry—all came to UCSF for a culture of collaboration that was more adventurous than the staid institutions of the east. That reputation holds today; five UCSF faculty members have received the Nobel Prize in Physiology or Medicine. In 2014, a longtime UCSF scientist won both the highly acclaimed Lasker Award for Basic Research and the Shaw Prize in Life Science and Medicine.

Among UCSF’s many medical milestones:

- First to discover how to transform ordinary adult skin cells into cells that, like embryonic stem cells, are capable of developing into any cell in the human body.
- First to discover the precise recombinant DNA techniques that led to the creation of a hepatitis B vaccine.
- First to perform in-uterine fetal surgery.
- First to clone an insulin gene into bacteria, leading to the mass production of recombinant human insulin to treat diabetes.
- First to develop prenatal tests for sickle cell anemia and thalassemia.
- First to discover that missing pulmonary surfactants are the culprit in the death of newborns with respiratory distress syndrome; first to develop a synthetic substitute for it, reducing infant death rates significantly.

Other San Francisco health care organizations have contributed many pioneering treatments as well:

- First “high-powered X-ray treatment machine for treatment of cancer” in the West. (California Pacific Medical Center, 1922)
- First iron lung west of the Mississippi. (CPMC, 1928)
- One of the nation’s first not-for-profit, integrated health care organizations in the country, which brought together a health plan, hospital and physician group to provide the full continuum of primary care, specialty care and community-based care, with a special emphasis on preventive care. This approach has now become the national model for care under the Affordable Care Act (Kaiser Permanente, 1945)
- First and largest hospital-dedicated burn unit on the West Coast. (Saint Francis Memorial Hospital, 1967)
- First total hip replacement surgery in California. (St. Mary’s Medical Center, 1970)
- National model for all-inclusive care for the elderly to enable frail seniors to live safely in their homes. (On Lok, 1970s)
- First toe-to-hand transplant in the U.S. (CPMC, 1971)
- First hospital in the U.S. to perform the balloon angioplasty procedure. (St. Mary’s Medical Center, 1978)
- First hospital-based athletic injury treatment program in the country. (Saint Francis Memorial Hospital, 1979)
- First heart transplant outside of a university research setting (CPMC, 1984)
- First program for AIDS-related dementia. (St. Mary’s Medical Center, 1987)
- First dedicated geriatric psychiatry unit in San Francisco (CPMC, 1994)
- First clinic in the nation to integrate homeopathy, acupuncture and other complementary modalities in to a major medical center. (CPMC, 1997)
- First traumatic brain injury program certified by The Joint Commission. (San Francisco General Hospital and Trauma Center(SFGH))
- First Acute Care for Elders (ACE) geriatric inpatient unit in California. (SFGH)
- First and only baby friendly hospital in San Francisco certified by the World Health Organization. (SFGH)
- First hospital in San Francisco to have a base-isolated foundation, the most advanced seismic-safety design known today. (SFGH’s new hospital, opening in 2015.)

As home to a growing biotechnology industry, and as the northern capital of Silicon Valley, San Francisco companies and venture capitalists are also driving a great deal of innovation. San Francisco’s Rock Health, for instance, provides startups with funding and full-service support. It partners with medical institutions, venture capital firms, and corporate strategic partners who offer its portfolio companies strategic insights on the health care industry. Rock Health often invests in San Francisco companies, including digital health companies Omada Health, Welkin Health and OpenPlacement.

“If anyone knows about health-tech innovation,” Inc. magazine reported earlier this year, “it’s the folks at Rock Health, a San Francisco seed accelerator for digital health-related startups backed by a handful of Bay Area VC firms, the Mayo Clinic, and Harvard Medical School, as well as corporate behemoths GE and United Health Group.” 2

Creating Space For Innovation At QB3

One pioneering magnet for the burgeoning biotech boom is QB3, a consortium run by UCSF, UC Berkeley and UC Santa Cruz, and headquartered at UCSF’s Mission Bay campus. QB3 was established by the University of California in 2000 to drive the state’s economy and improve the quality of life for its residents.

QB3 scientists take on challenges in molecular biology using the techniques of physics, chemistry, and computer sciences. They also patent their discoveries and launch spinoff companies. Carolyn Bertozzi created Redwood Bioscience to commercialize her protein engineering work. Kevan Shokat formed Intellikine to engineer small-molecule cancer therapies. Jay Keasling, with the incorporation of Amyris, launched the biofuels sector of the synthetic biology industry.

Graduate students and postdoctoral fellows, with their youth and energy, are a rich resource for innovation and job creation. QB3 has built a matrix of support for entrepreneurs that includes a renowned incubator network and a venture capital fund. The 105 companies in QB3’s incubators have created hundreds of jobs and attracted more than half a billion dollars in investment.

QB3 also connects UC scientists to global industry through a number of innovative partnerships such as a $3.5 million per year alliance with Pfizer.

— QB3 website, http://qb3.org/about

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

San Francisco has a reputation as a compassionate city, one that historically welcomed all newcomers and offered not only opportunity but also a promise of access to care. The city’s health sector embodies that reputation today, with hospitals and other entities providing thousands of people with millions of dollars’ worth of medical care.

1. Overall charity care provided in San Francisco in 2012 was $203.7 million. In addition, hospitals contributed $279.5 million in subsidized care to Medi-Cal beneficiaries.

2. In 2013, community hospitals provided more than $94 million in support of other community programs including health education, health prevention and early diagnosis services as well as grants and in-kind services.

3. In 2013, the San Francisco Community Clinic Consortium clinics saw 92,640 patients, equal to nearly 10 percent of the San Francisco population, a staggering number for a city with one of the highest costs of living in the country.

4. Acute care hospitals partner with community-based organizations to provide primary care and support services to low-income, vulnerable residents. These partnerships may include grants, in-kind services such as outpatient laboratory and imaging tests or outpatient surgery provided by volunteer doctors and nurses.

5. The San Francisco Department of Public Health provides a complete system of care to patients who include Medi-Cal members and the uninsured. The Department’s San Francisco Health Network provides pre-natal and pediatric, primary and specialty care, hospital and long-term care, rehabilitation, substance abuse treatment and mental health services. It also includes the trauma center at San Francisco General Hospital, where life-saving care is provided to all city residents and visitors.

6. Overall charity care provided in San Francisco in 2012 was $203.7 million. In addition, hospitals contributed $279.5 million in subsidized care to Medi-Cal beneficiaries.

Caring for the Least Fortunate

Fighting the Scourge of Hepatitis B

Hepatitis B afflicts many Asians and Pacific Islanders. One in 12 immigrants will have a chronic infection with Hepatitis B, and one in four of those with the chronic infection will develop liver cancer. Because of San Francisco’s large Asian population, its hospitals serve on the front lines in the fight against this disease.

Chinese Hospital has been at the forefront of screening, monitoring and ensuring appropriate follow-up care for the Chinese residents of San Francisco. Through the San Francisco Hep B Free Campaign Quality Improvement Collaborative, physicians who are part of North East Medical Services and Chinese Community Health Care Services are implementing automatic prompts in their Electronic Health Record systems to ensure ongoing follow-up and treatment of patients with a chronic Hepatitis B infection. This rigorous practice appears to have had a positive impact, as recent studies indicate a reduction in the incidence of new liver cancer cases.

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(Source: CA Office of Statewide Health and Planning Development and SF VA Medical Center)
Some innovative programs are also bringing health care to those most in need:

**Healthy San Francisco:** The San Francisco Department of Public Health (DPH) made history in 2006 by establishing Healthy San Francisco, the first health access program for the uninsured in the nation. Under this program, the city provides health access to all residents regardless of their income or immigration status. Healthy San Francisco links participants with a Medical Home, which is a clinic that provides primary care, social services, case management and preventative care. The program is not designed as insurance but as an innovative reinvention of the city’s health care safety net, enabling and encouraging residents to access primary and preventive care. The San Francisco Health Plan, in partnership with the San Francisco DPH, administers Healthy San Francisco.

**PACE (Program of All-inclusive Care for the Elderly):** The PACE model of care was developed in the early 1970s, when the Chinatown-North Beach community of San Francisco saw the pressing needs for long term care by families whose elders had emigrated from Italy, China and the Philippines. On Lok Senior Health Services created a community-based system of care. On Lok is Cantonese for “peaceful, happy abode.” The On Lok model of care became a national model integrating the funding from both Medicare and Medi-Cal. On Lok Lifeways is a certified PACE program. The PACE model is centered on the belief that seniors with chronic care needs and their families are best served in their community whenever possible. The PACE model serves individuals who are 55 years of age or older, certified by the State of California to need nursing home care, able to live safely in the community at the time of enrollment, and live in a PACE service area. Medical care including in- and outpatient care and home support as needed is included in the program.

**SAN FRANCISCO STORIES:**

**Ann Lin Finds Her Community at On Lok**

Ann C. Lin is 81 years old and is a participant at the On Lok Lifeways Gee Center at 1333 Bush St., San Francisco. Ann was born in Wuhan, China, the youngest of six. She came to the United States in 1965 to pursue a master’s degree at Kentucky Christian University.

Ann has always enjoyed drawing and church music. Since she does not have close family in San Francisco, the opportunity to join On Lok one year ago has been a blessing for her. She took a bad fall, she said, but now, “with the support of On Lok’s staff, I exercise to become stronger. I hope I can get back to my choir.”

She comes to On Lok twice a week and enjoys the exercise and other programs. She added with a smile: “Every employee here is dedicated. They take care of us seniors as if we were their babies.” Ann’s wish is that there would be more organizations like On Lok to help seniors enjoy life and independence across the country. Already more than 90 organizations nationwide have adopted On Lok’s PACE model.
Community HealthCorps. The San Francisco Community Clinic Consortium’s Community HealthCorps places individuals interested in pursuing community health careers in a community health setting for a year of service working directly with underserved San Franciscans. Each year SFCCC enrolls about 25 AmeriCorps volunteers into national service positions serving uninsured, underserved, homeless, and low-income clients of partner health centers and other community service sites, providing them with the experience and skills they need to pursue careers in community health. Annually the AmeriCorps members devote 1,700 hours over 10½ months to community service. Last year, they provided about 35,000 patients with health services, enrolled about 500 patients in health access programs and provided about 4,000 referrals. Nearly 80 percent of the program’s graduates are accepted into graduate or medical school post-service and go on to become doctors, nurses, social workers, and other health professionals. Most of the others are hired by their placement site or attain paid positions in community-based or health care organizations.

Project Homeless Connect. On any given night in San Francisco, an estimated 6,000 to 12,000 people are homeless, and 20 percent are chronically homeless. In 2004, the San Francisco Department of Public Health created Project Homeless Connect (PHC) as a way to bring necessary services to this population. Today, more than 1,000 community volunteers partner with government agencies, nonprofits, and the private sector every two months to provide a single location with comprehensive health and human services for homeless San Franciscans. During PHC’s events, participants are able to accomplish in one day what might normally take eight months. The federal government has declared Project Homeless Connect a national best practice model and it’s been replicated in more than 260 cities across the country and internationally. Among the committed community partners, Blue Shield has contributed $225,000 to the project since 2004, with more than 500 employees offering their time and support.

SAN FRANCISCO STORIES: George Lowers His Blood Pressure

One Thursday morning, George came onto the San Francisco Community Clinic Consortium’s Street Outreach Services medical van for a blood pressure check while it was making one of its weekly stops in the Mission District. His blood pressure was 183/119, stage II hypertension—almost high enough to send him to the emergency room.

Health workers in the van set him up with a primary care physician at a SFCCC partner health center and discussed lifestyle changes he could make. He now has a doctor managing his high blood pressure with medication; he has cut back on alcohol, and he has reduced both his cigarette smoking and sodium intake. He told the SFCCC that it gave him that last push he needed to make changes in his life.

George came back to that van a few months later and the health workers took his blood pressure. His reading was 120/78—right on target! George thanked everyone with a big smile and told them that they had saved his life.
Deserving Dignity

Eight Sisters of Mercy arrived in San Francisco from Ireland to begin caring for the poor in 1854, and by the following year, just in time for a cholera epidemic, they opened St. Mary’s Medical Center (SMMC), the oldest continually operating hospital in the city. Five prominent San Francisco doctors founded its sister hospital, Saint Francis Memorial Hospital (SFMH), half a century later in 1905. The two are part of San Francisco-based Dignity Health, one of the five largest hospital systems in the nation, a 21-state network of 9,000 physicians, 55,000 employees, and more than 380 care centers, dedicated to providing high quality care to the poor and underserved. In 2013, Dignity Health provided nearly $1.7 billion in charitable care and services nationwide, and it is no stranger to compassionate care here at home.

The Sisters of Mercy’s charitable mission continues today at the St. Mary’s Sister Mary Philippa Health Center, the largest private hospital-based medical clinic in San Francisco. The clinic provides comprehensive outpatient services for a broad spectrum of care, serving a socially and ethnically diverse population of patients through Healthy San Francisco, including those without coverage, regardless of their ability to pay. Of the 4,000 underinsured patients that the clinic serves, 1,253 are members of Healthy San Francisco. Nearly 90 percent of these patients live below 200 percent of the federal poverty level. In addition, as a vital part of the city’s health care safety net, St. Mary’s Clinic provided 35,000 outpatient services in 2013, including adult primary care and specialty care. Ancillary services include on-site interpreters, a pharmacy, and access to the hospital’s diagnostic services.

Across town, Saint Francis Memorial Hospital (SFMH) has enjoyed a 15-year partnership with Glide Health Services and provides outpatient and pharmaceutical services for its patients. SFMH also works closely with the other primary care clinics in the areas near the hospital: St. Anthony’s Foundation Free Clinic, Curry Senior Center, South of Market Medical Clinic, and the Tom Waddell Clinic. SFMH has a history of partnering with the San Francisco Department of Public Health and other community-based agencies to support services that meet the needs of their shared patient population.

SAN FRANCISCO STORIES:
Treating The Whole Patient At St. Mary’s

A 40-year-old woman suffered from an anxiety so severe that she endured panic attacks, extreme agoraphobia and anorexia. She was uninsured and had not seen a doctor in 12 years. When she found a lump in her breast, she had to be coaxed from her bedroom by her family, who brought her to the Sister Mary Philippa Health Clinic at St. Mary’s Medical Center.

At the clinic, she was enrolled into a Medi-Cal program, the Breast and Cervical Cancer Treatment Program (BCCTP). Due to her anorexia, she was frail and undernourished, which prevented her from being able to tolerate chemotherapy. With help from a nutritionist at the clinic, she began to gain weight and finally receive the treatment she needed.

Today, this patient attends all of her appointments and has made connections with the various providers. Through the clinic, she was referred to Shanti Lifelines, which provides supportive care to women with breast cancer. Whereas once this patient refused to leave her home, she is now an active participant in her own care.

Gero-Psych Hospital Fills The Gap

The Jewish Home of San Francisco opened an acute geriatric psychiatry hospital in its Koret Center, recognizing and fulfilling the need for a specialized facility to focus on the complex psychiatric and psychological disorders of older adults who also often have complex medical problems.

Today, this hospital, licensed to admit both voluntary and involuntary patients, is one of the only enterprises in 14 Bay Area counties that addresses the emotional and mental health issues of seniors. “Despite the rapidly growing population of older individuals, all too often their problems are ignored or written off as being problems of aging,” contends Elliott Stein, MD, the hospital’s medical director. When individuals age, he explains, they may acquire mental and emotional problems that are unique to this stage of life. “Although these problems may be complex and multifaceted; they can be highly treatable,” he says. “Older adults often respond quite well to treatment.”

In September 2012, the psychiatry hospital began serving as a training site for future geriatric psychiatrists from UCSF.
The wide-ranging impact of the health sector is seen in many different places in San Francisco, some well known and others nearly invisible.

**Health Professions Training**

San Francisco trains health professionals who earn degrees in medicine, nursing, dentistry, pharmacy, clinical laboratory science, physical therapist, psychology, public health and other health professions. Many become leaders in their fields. Students from around the world compete for admission at UCSF, Kaiser Permanente, University of San Francisco, Pacific School of Dentistry, San Francisco State University and Community College of San Francisco.

**Responding to Disasters**

Hospitals work with city and county emergency medical services every day to provide health care and related services to San Francisco. During disasters, an emergency response plan is implemented that involves coordination and communication between all health care providers to treat victims. From the 1906 earthquake and fire to the 1989 earthquake and Bay Bridge collapse to the 2012 San Bruno Fire to the 2013 Asiana Airlines crash, public and private health sector institutions have collaborated closely to save lives, minimize damage and pull together as a community to recover and rebuild.

When the 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 the trauma center at San Francisco General Hospital saw the most patients, and the most critically injured, the entire health sector pulled together to respond. The burn center at Saint Francis Memorial Hospital stood ready for what could have been a major influx of patients.
Healthy Environment

The San Francisco health sector has supported local ordinances that support healthy communities such as:

- Ban on sale and possession of firearms with large-capacity magazines.
- Ban on tobacco sales in pharmacies recently adopted by CVS Health, Target and others.
- Ordinance placing the same regulations on e-cigarettes as tobacco products.
- Disclosure of smoke free or smoking optional units in multi-unit housing.
- Adoption of Laura’s Law/Assisted Outpatient Treatment to provide treatment for severely mentally ill adults.
- Ban on smoking in public places.

Partnerships to Provide Community Assistance

Since 1995, community hospitals have been working together to complete a community health needs assessment (CHNA) every three years. In San Francisco the process evolved into a publically available, regularly updated web site with a dashboard to measure progress on health outcome measures. The CHNA process then resulted in the formation of San Francisco Health Improvement Partnership (SFHIP), a cross-sector initiative designed to improve the health and wellness of all San Franciscans. The community identifies health outcome goals, and SFHIP coordinates the implementation of changes to meet those goals.

Community hospitals also partner with the San Francisco Department of Aging and Adult Services and Northern California Presbyterian Homes & Services to implement the San Francisco Transitional Care Program. The program provides temporary case management, home care assistance, escorts and in-home personal needs for medically at-risk patients for a safe transition from care facilities to home.
To meet our future challenges and opportunities, the health sector needs support from every level in our community.

The world of health care is rapidly changing. Technological advances are increasing our knowledge of diseases and how to treat them. Governments are working to make sure every person receives the health care they need. Shifting demographics alter the nature of the communities that need serving. Economic conditions vary, sometimes throwing up roadblocks to the efficient delivery of health services.

As these changes become manifest, San Francisco’s health sector is working proactively to meet them head on.

1. The Affordable Care Act challenges the health sector to enhance the care delivery model to improve patient outcomes, increase patient satisfaction, decrease costs and accommodate the influx of the newly insured. Changing the incentives from fee-for-service payments to reimbursements based on quality of care, patient satisfaction and health outcomes will require the participation, collaboration and innovation of the entire community.

2. Different groups of people experience varying rates of disease and death for the same conditions. For example, the percentage of the San Francisco population with diabetes varies by race and ethnicity: White, 1.2 percent; Latino, 5.2 percent; Asian, 7.2 percent; and African American, 15.8 percent. Many variables affect the incidence of a particular disease, including genetics, care received, behavior choices and the social determinants of health—those conditions in which individuals are born, grow, live, work and age, such as socioeconomic status, education level and availability of culturally and linguistically appropriate services. The health sector continues to work with impacted communities to address these health outcome disparities.

3. In the future, primary care practitioners will be even more critically important in managing our care, especially our chronic diseases. The need to train primary care physicians and others such as nurse practitioners and physicians’ assistants will be vital to treat more patients and the aging population.

4. Managing chronic diseases such as diabetes, hypertension, asthma and many others will require a focus on prevention strategies such as access to healthy foods, safe places to be active, living in tobacco-free communities, self-sustaining jobs and education and access to health care. Increasing the pace of our public-private cross-sector collaboration in land use, transportation, education, housing, parks and recreation, zoning and business licensing policy decisions will lead to healthier neighborhoods and individuals.

5. Many diseases lack a cure. San Francisco will be a leader in the global effort to discover new therapies and treatments that save and extend lives, and alleviate pain and suffering.

6. With an aging population, a full range of community-based supportive services will be required to enable older adults to live in the most independent setting possible, to avoid relying on taxpayer-supported public services, and to be treated with dignity and respect in their final years.

To address these challenges, health sector organizations need partners who believe in the mission to deliver health, healing and hope and who will support necessary changes to make San Francisco a healthier community that continues to strengthen the local economy.
Conclusion

As a global epicenter of discovery, San Francisco’s vitality is closely linked to its dynamic health sector.

You know the doctors, pharmacists, dentists and nurses providing care, but you don’t always see the scientists, educators, community organizers and entrepreneurs. All of these committed individuals work to improve health both locally and worldwide with breakthroughs like stem cell research, fetal surgery, the San Francisco model of AIDS care and pioneering technologies in robotics and imaging.

Our robust health industry provides tangible benefits to our city.

It brings employment, ranging from highly skilled jobs to those at the entry level. Nearly one-quarter of jobs in San Francisco are in health-related fields.

It brings construction, with nearly $5 billion invested in building new facilities and improving existing ones.

It brings innovation, as witnessed by the virtual explosion in the number of biotech companies in San Francisco in the past decade—from one in 2003 to more than 100 today.

And it brings visitors—people who want to see this cutting-edge health ecosystem at the tip of Silicon Valley. More than 200,000 out-of-towners come to our health-related conferences and trainings every year to learn from the best in the industry.

It all adds up to a more than $28 billion contribution to San Francisco’s economy.

Beyond the dollar signs, the health sector provides a healthy foundation for everything that happens here.

It means we have access to the most advanced medical treatments in the world, as well as community clinics and programs that help keep our entire city healthy. It means we’re a place of compassion, providing care for our poor and underserved; leading the way in emergency and disaster response.

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.
Acknowledgements

Produced by the
San Francisco Section of the
Hospital Council of Northern and Central California

San Francisco Hospitals
Sutter Health California Pacific Medical Center
Chinese Hospital
Jewish Home of San Francisco
Kaiser Permanente Hospital
Laguna Honda Hospital and Rehabilitation Center
Saint Francis Memorial Hospital
St. Mary’s Medical Center
San Francisco General Hospital and Trauma Center
UCSF Medical Center
UCSF Benioff Children’s Hospital
VA Medical Center San Francisco

Partners
BayBio
Blue Shield of California
CVS Health
Gladstone Institutes
On Lok, Inc.
Rock Health
San Francisco Department of Public Health
San Francisco Center for Economic Development
San Francisco Community Clinic Consortium
San Francisco Medical Society
San Francisco Travel Association

Financial Contributions
McKesson Corporation

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Economist: Philip King, Ph.D.
Graphic artist: Tony Agguio Design, Sausalito
Steering Committee: Denise Alexander, Lisa Cisneros, Barbara Dunn, Rachael Kagan, Dianne Milliaras, Dee Mostofi, Randy Wittorp
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Find out more at http://www.hospitalcouncil.net/post/sf-health-impact-report
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San Francisco, 2014