



HEALTH CARE SERVICES MASTER PLAN 2017 UPDATE

PLANNING COMMISSION INFORMATIONAL HEARING | DECEMBER 7, 2017



San Francisco
Department of Public Health

San Francisco
Planning

AGENDA

Today's Hearing:

- San Francisco's Health Facility Landscape
- HCSMP Overview

Upcoming Hearings in Early 2018:

- Initiation
- Joint Adoption Hearing w/Health Commission



HAIGHT ASHBURY FREE CLINIC



ZUCKERBERG SF GENERAL HOSPITAL



CHINESE HOSPITAL



KINDRED HEALTH

HEALTHRIGHT360

HEALTH
CARE IS A
RIGHT


S. Van Ness

SOUTH VAN NESS



HOSPITALS / MEDICAL CENTERS (102, 890.44)

ZUCKERBERG SF GENERAL HOSPITAL

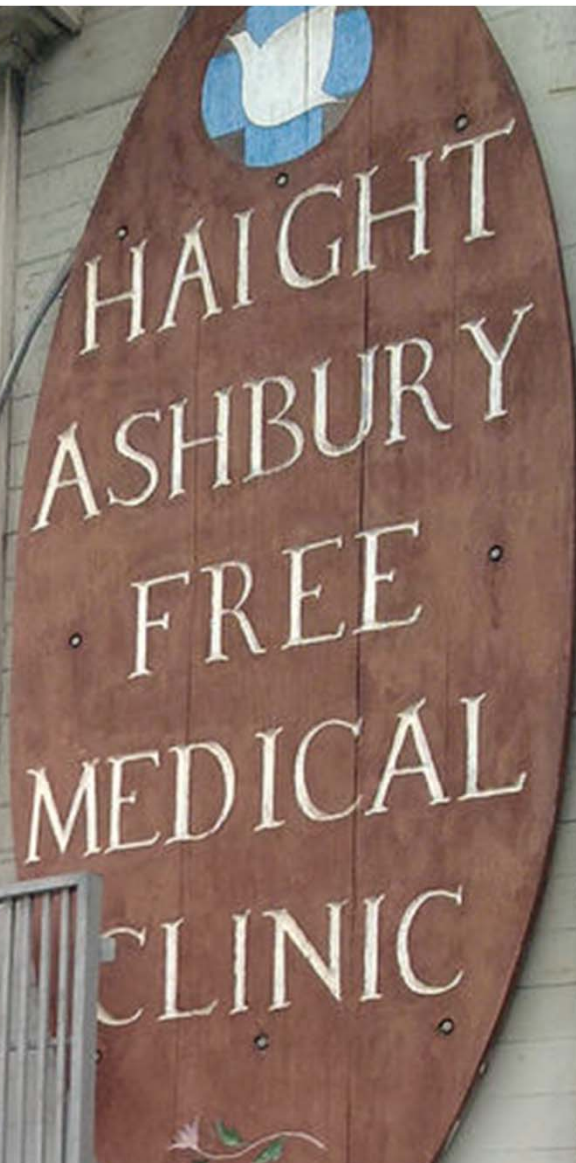
A photograph of the Zuckerberg San Francisco General Hospital building. The building is a mix of old and new architecture. On the left is a historic brick building with ornate windows. To its right is a modern building with a curved facade and a white, grid-like structure. The sky is clear blue. In the foreground, there are trees, a colorful mural on a wall, and several cars parked on the street.

San Francisco's 7 hospitals (at 12 locations) provide inpatient, outpatient, and emergency care, typically short-term.

HEALTH SERVICES / MEDICAL SERVICES (102, 890.114)


Outpatient facilities providing licensed medical care, including:

- Community clinics
- Private doctor's offices
- Dentists
- Outpatient surgery
- Acupuncture
- Etc.



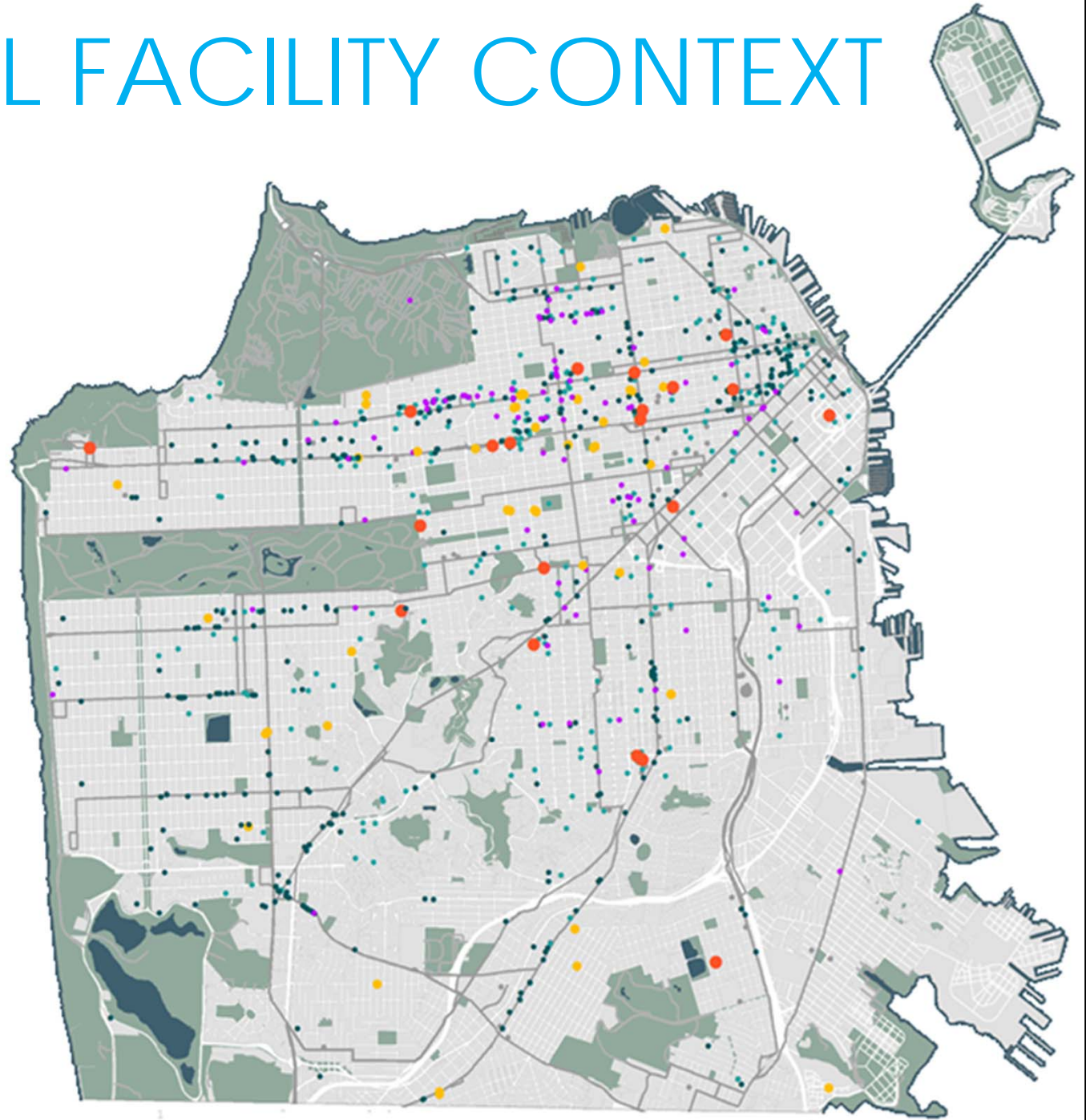
RESIDENTIAL CARE FACILITY (102, 890.50)

JEWISH HOME OF SAN FRANCISCO (under construction)

- 
- Facilities providing 24-hour lodging and care, including:
 - Skilled Nursing Facilities (SNF)
 - Residential behavioral health
 - Other long-term care

MEDICAL FACILITY CONTEXT

- 25 million ft² of medical facilities
- 40k jobs (4th largest sector)
- 15% job growth in 2010-15

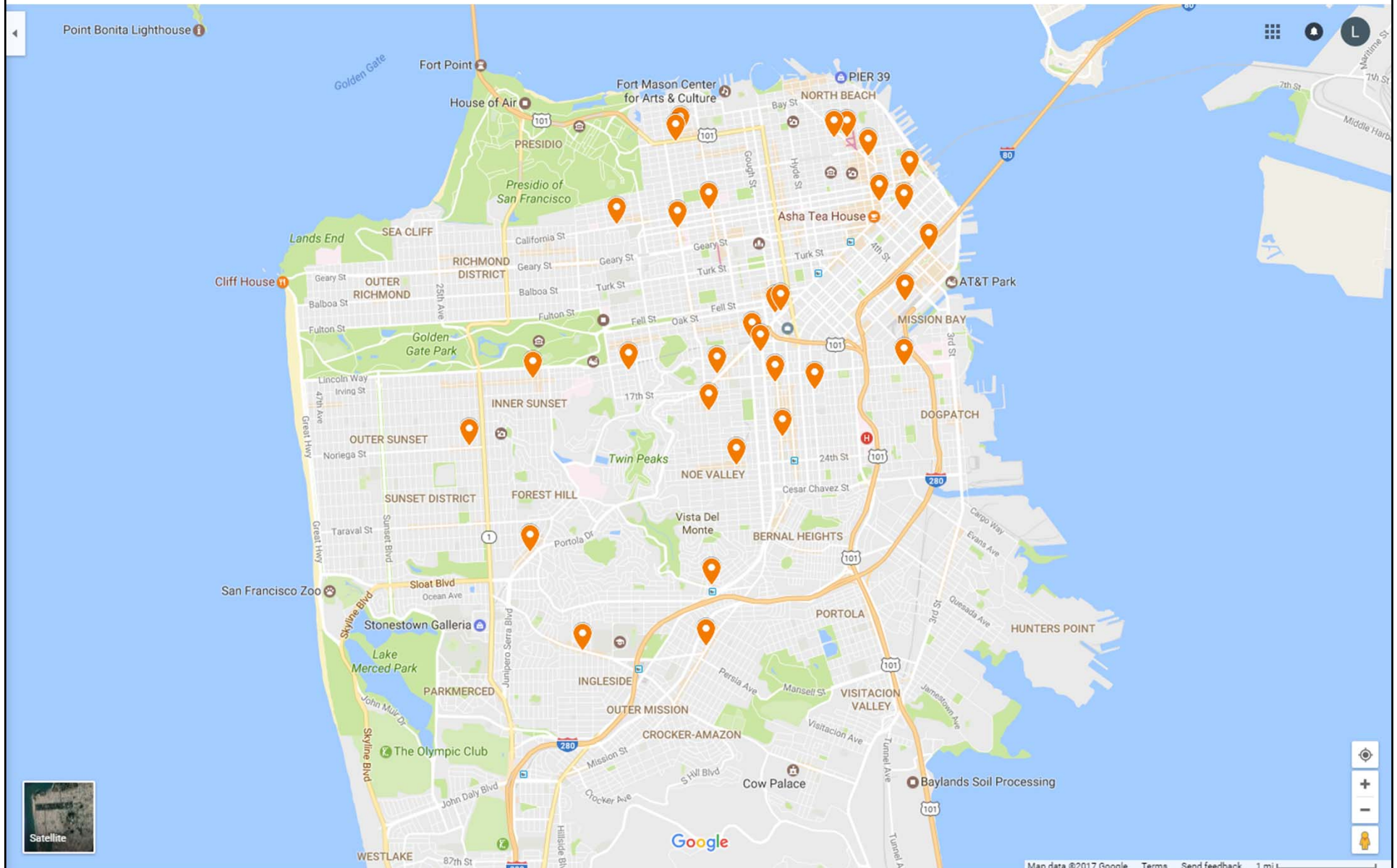


MEDICAL FACILITY PIPELINE

- **Current pipeline:** 1.3 million ft², 6 projects
- **Recent completes:** 1.6 million ft², 11 projects (2007-2016)
- **2013 HCSMP projections:** 800,000-1,500,000 ft² by 2035, likely to be in outpatient facilities



A RECENT TREND: FOR-PROFIT OUTPATIENT MEDICAL CENTERS(e.g. One Medical, GoHealth Urgent Care)



TRENDS SHAPING THE FUTURE OF HEALTH CARE IN SAN FRANCISCO

- Demographic shifts
 - Growing by >200,000 residents, reaching 1.1 million by 2040
 - Population >65 years old will double by 2060 (to 27% of population)
- Movement towards outpatient care
- Affordable Care Act (ACA) implementation
- Industry trends & innovations
- Health workforce shortages



HCSMP OVERVIEW

2017 HCSMP UPDATE

HCSMP PURPOSE

- **Identify current & future healthcare needs** in SF, with a focus on improving access for vulnerable populations
- Recommend an **appropriate & equitable geographic distribution** of facilities
- Provide a framework for **reviewing future medical use development projects**
- Provide **other policy recommendations** related to healthcare services as needed

HCSMP HISTORY

- **December 2010:** HCSMP Ordinance signed into law
- **July 2011 – June 2013:** First Health Care Services Master Plan (“2013 HCSMP”) developed
- **December 2013:** 2013 HCSMP adopted and went into effect
- **Summer 2016:** Plan update initiated (“2017 HCSMP”)

2017 HCSMP COMPONENTS

ASSESSMENTS

**CONSISTENCY
DETERMINATION
GUIDELINES**

**SUPPORTING
LEGISLATION &
RECOMMENDATIONS**

2017 HCSMP: KEY UPDATES

ASSESSMENTS

- Community Health Assessment
- Health Systems Trends Assessment
- Capacity and Gap Assessment
- Land Use Assessment

KEY UPDATES

- Updated information on health needs & policy at local, state, and federal levels.
- Focus on long-term care (including Skilled Nursing Facilities) and behavioral health needs.

2017 HCSMP: KEY UPDATES

CONSISTENCY DETERMINATION GUIDELINES

- Used to evaluate new medical facilities > 5k GSF (or >10k for change of use)

KEY UPDATES

- **Consolidated / streamlined list**
- **Process changes:** create alignment between the HCSMP and the IMP by applying the requirement to *institutions rather than individual facilities*

CONSISTENCY DETERMINATION PROJECTS



HEALTHRIGHT 360

- SUBMITTED: May 2014
- COMPLETED: August 2017



JEWISH HOME

- SUBMITTED: July 2014
- GROUNDBREAKING: Oct 2016



PLANNED PARENTHOOD

- SUBMITTED: May 2017
- APPROVED: August 2017

2017 HCSMP: KEY UPDATES

SUPPORTING LEGISLATION & RECOMMENDATIONS

- **New in 2017 HCSMP:** Supporting policies separate from the Plan itself, but proposed concurrently with adoption

KEY UPDATES

- **Supporting legislation** proposed at time of HCSMP adoption.
- **Policy recommendations** highlighting longer-term policy needs.

SUPPORTING LEGISLATION (DRAFT)

- **HCSMP process modifications** to increase efficacy and efficiency.
- Policies to **streamline development of high-priority health care facilities**, including Skilled Nursing Facilities (SNFs).
- Policies to **facilitate the development of outpatient facilities** (“health / medical services”):
 - Stronger design review process to ensure fit with neighborhood character
 - Policies to mitigate impacts on the ground floor

An additional list of longer-term Policy Recommendations will be presented at a future hearing.

2017 HCSMP OUTREACH PLAN



Stakeholder Interviews (done)
with 33 individuals @ 25 organizations



Briefings
with key stakeholders & advocacy
organizations



**Workshop with health care
providers**



Online Survey



Public Hearings
with Health Commission, Planning
Commission, & Board of Supervisors



Public Comment Period
on Draft Plan (30 days)

2017 HCSMP TIMELINE





THANK YOU

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