

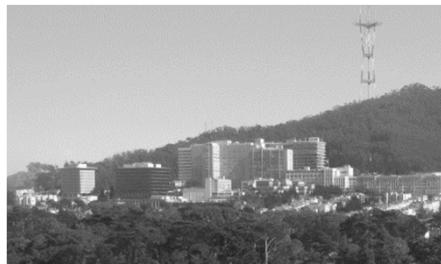


Our Journey: Vision 2014-2025

UCSF Health Strategic Plan

UCSF Health

A History of Successful Transformation



**MEDICAL
CENTER**
2014 and prior



**HEALTH
SYSTEM**
2015 - 2020

UCSF Health

“

“...To provide innovative, high-quality, cost-competitive clinical services, and deliver an unparalleled patient experience across the entire care continuum.”

UCSF Health Vision 2020

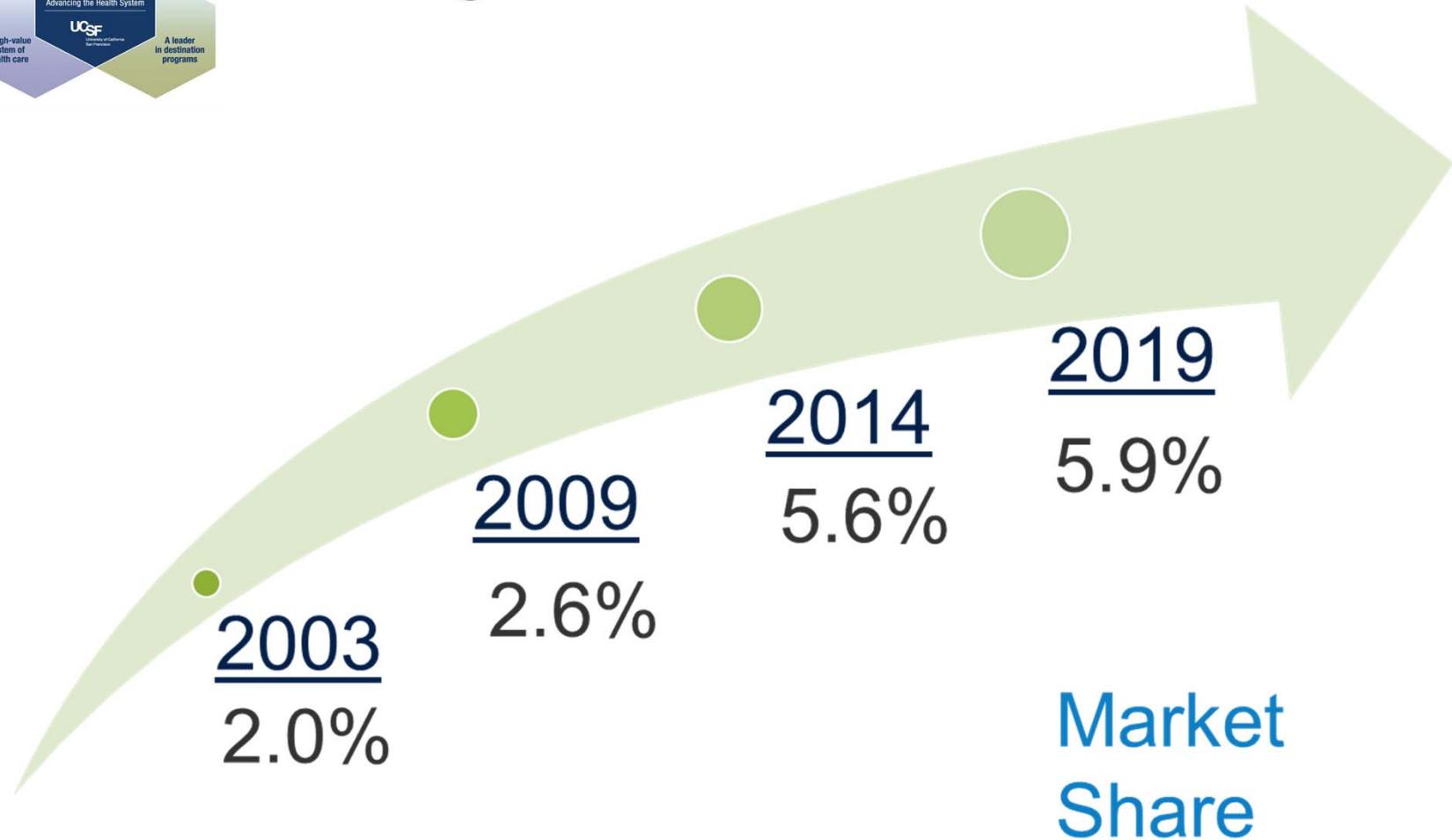


Remarkable Growth

	2014	Prelim 2019	Growth
Revenue (\$000)	2,390,273	4,819,214	102%
Outpatient visits	963,692	1,985,553	106%
Licensed beds	720	1,276	77%
Admissions	29,230	44,809	53%
Patient days	180,520	287,882	59%



Serving More Patients



Market
Share



UCSF Health

Redefining possible.TM



UCSF Benioff Children's Hospitals
Oakland | San Francisco



Among the Nation's Best in 10 Specialties

UCSF Health



UCSF Health



Bakar Precision Cancer
Medicine Building (2019)



Weill Institute for
Neurosciences (2020)



Child, Teen and Family Center and
Department of Psychiatry (2020)



UCSF Health



Awards and Accolades



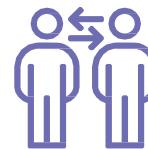
Recognition of our leadership in quality and safety

Regional and National Market Forces

Now more than ever, we need to be strong in the face of headwinds



Pricing pressure



Vertical
consolidation



Market
consolidation
in the Bay Area



Rising costs of
care



Outside
entrants



Threats to
supplemental
funding



Consumerism



Mental health
crisis



Costly
geography

UCSF Health Specific Considerations

We must grow to support our mission and our community



Major upcoming capital commitments for facilities



Imperative to elevate health equity into plans and be visible



Need to optimize integration across UCSF entities and resources



Importance of preserving and enhancing our academic mission while succeeding as a health system

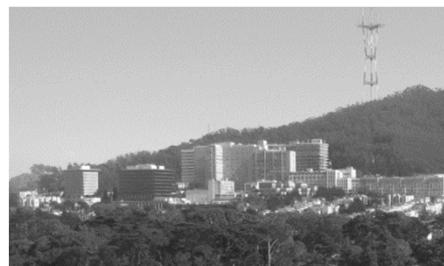


Capacity constraints



Existence of multiple partnerships and affiliations

A History of Successful Transformation



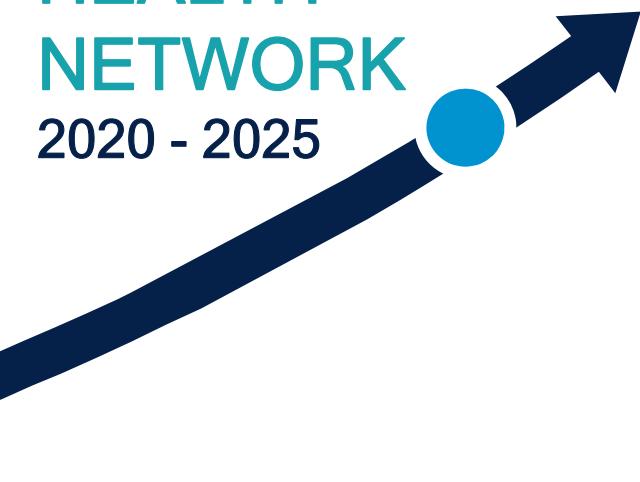
**MEDICAL
CENTER**
2014 and prior



**HEALTH
SYSTEM**
2015 - 2020



**HEALTH
NETWORK**
2020 - 2025



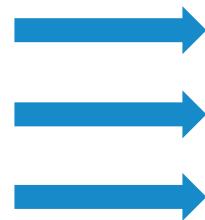
From 2014 to 2025

Evolution, not revolution



From 2014 to 2019

- Destination Programs
- High Value System of Care
- Culture of CPI



From 2020 to 2025

- Complex Care Leadership
- UCSF Health Network
- Innovation at Scale



Core Elements of Our Mission

Key to the successful execution of our strategy



Health Equity

- Strengthen UCSF Health's ability to deliver equitable care and outcomes



Behavioral Health

- Address unmet needs and improve access to Behavioral Health in the Bay Area

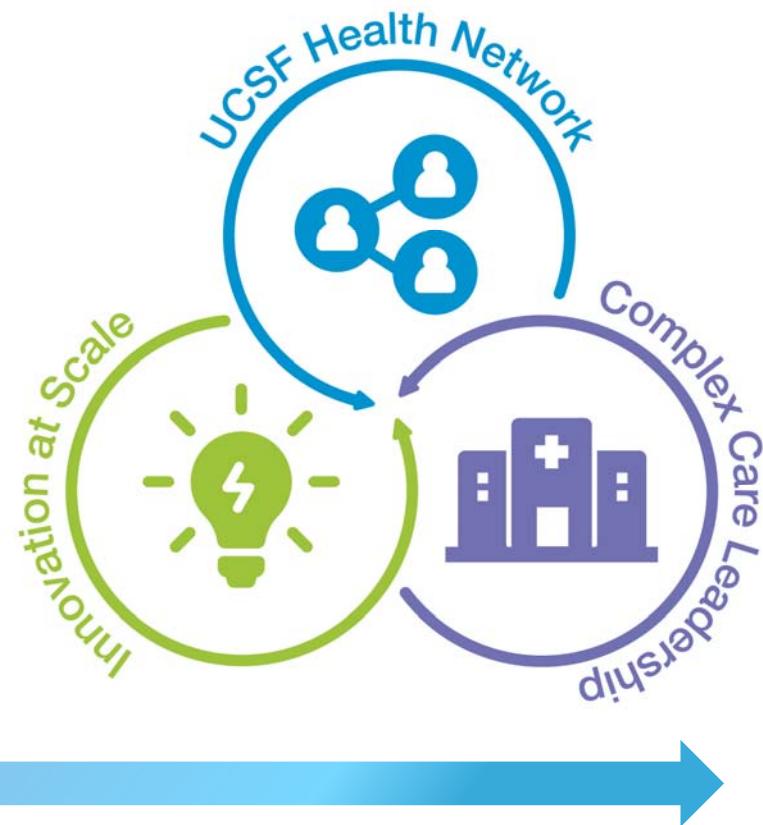


Academic Alignment

- Continue to support and integrate UCSF education and research priorities

Evolution, Not Revolution

From 2014 to 2025





From Destination Programs
to Complex Care Leadership



Destination Programs Background

Strategic initiative to fuel engine of UCSF Health

Key pillar of
UCSF Vision 2020

Launched in 2014,
critical element of SP

Focused on
strategic growth

Specialized, high-value,
well-running programs

Broad range of
investments

Clinical/admin staff, MD
backstops, marketing, IT



Demonstrated exceptional volume and margin growth
with a modest investment, through a *thoughtful investment
approach and multidisciplinary collaboration*



Destination Programs

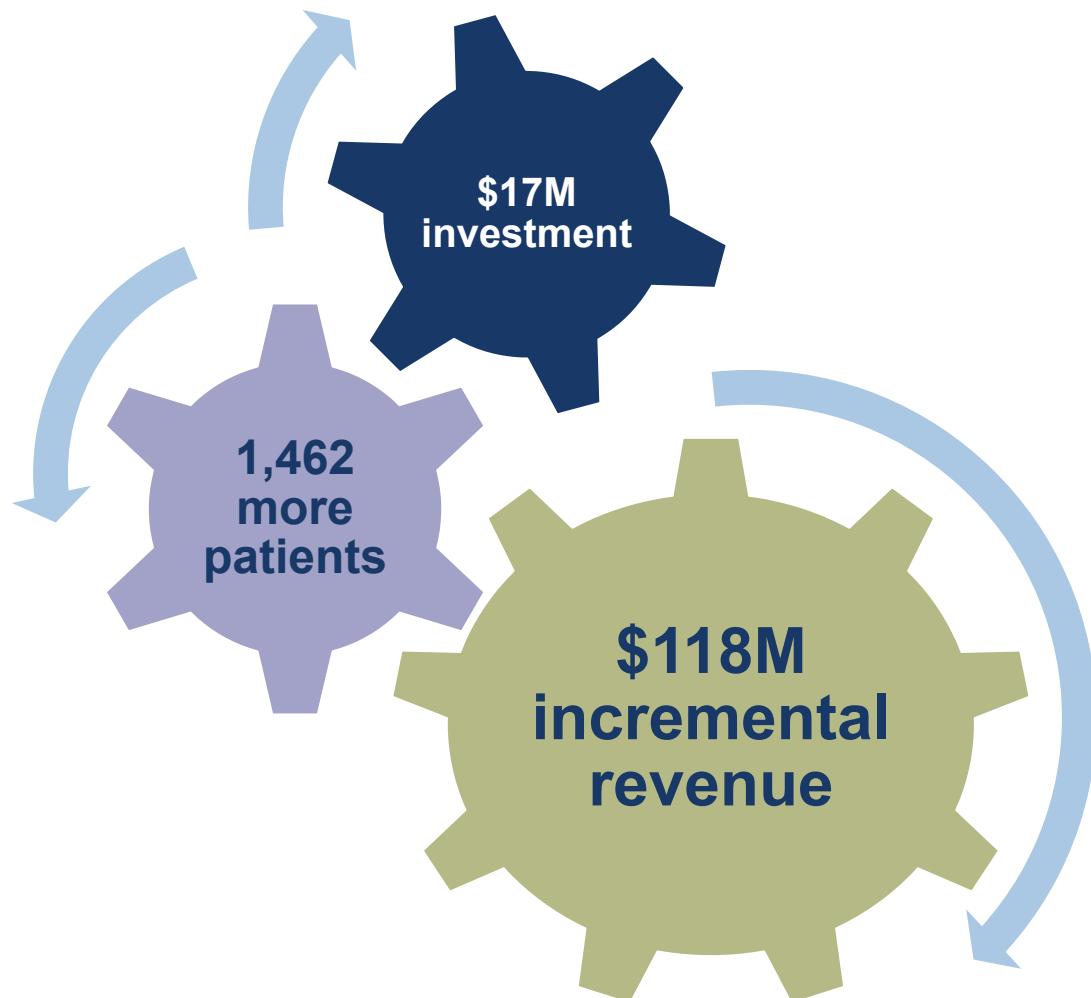
Areas of investment

- BMT/Malignant Hem
- Brain & Spinal Glioma
- Epilepsy
- Living Donor Liver TP
- Pediatric Brain Center
- Ped Pulm Hypertension
- Prostate Cancer (Urology)
- Total Joint
- Living Donor Kidney TP
- Fetal Treatment Center
- Interstitial Lung Disease
- VAD
- Adolescent Med/Eating
- CRH
- Endocrine Neoplasia
- Head & Neck Oncology
- Neuroendocrine Tumor
- Pancreas Cancer
- Pediatric Digestive Health
- Pediatric Heart Center
- Adult MS



Destination Programs

Results





Complex Care Leadership

Vision 2025 Goals



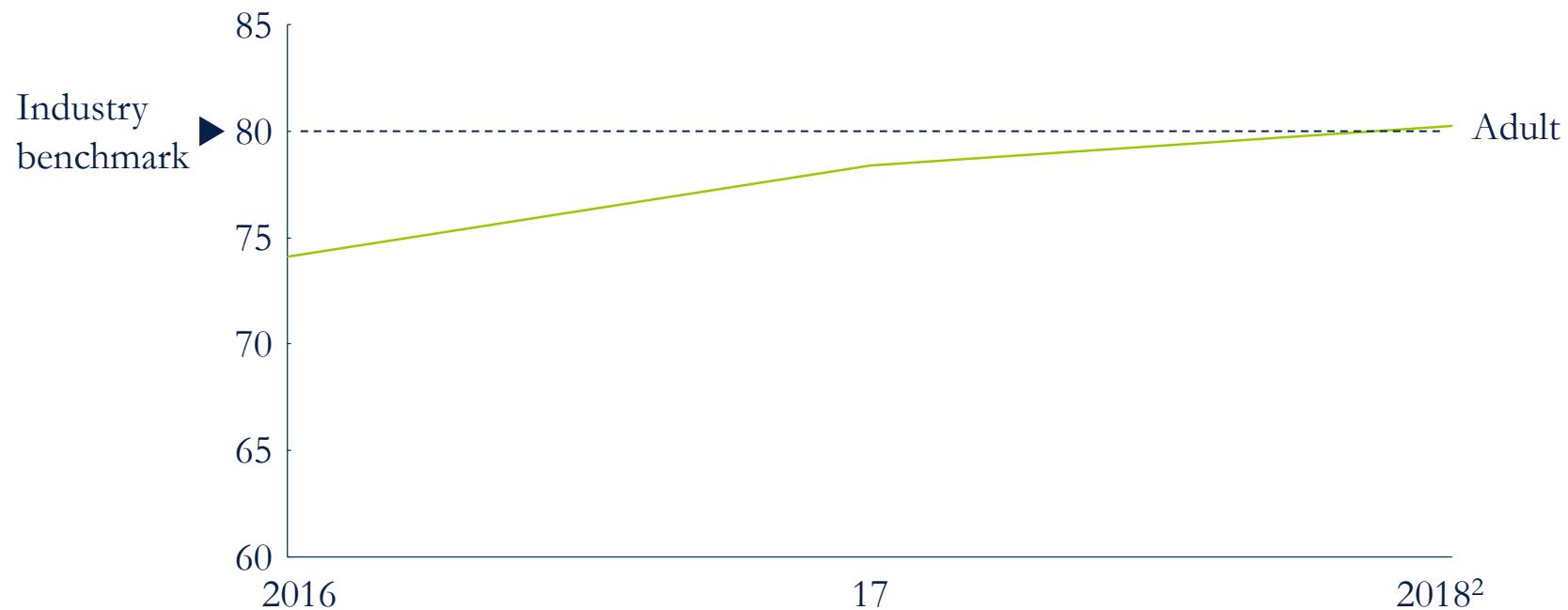
Fulfill UCSF Health's unique role in the Network as Bay Area's leading complex care provider and a destination for T/Q care

- Achieve #1 in T/Q market share in the Bay Area by creating capacity to care for the most complex patients
- Selectively pursue national / international opportunities
- Leverage our clinical and academic differentiation, including increasing the prominence of our breakthrough diagnostics and therapies



Current Bed Availability Limited

Average occupancy by fiscal year





#1 in Complex Care

Our five-year goal



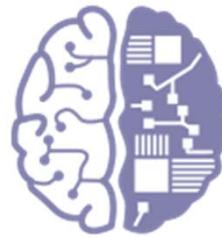
Cancer



Complex
Orthopedic
Surgery



Heart
&
Vascular



Neuroscience



Specialty
Surgery

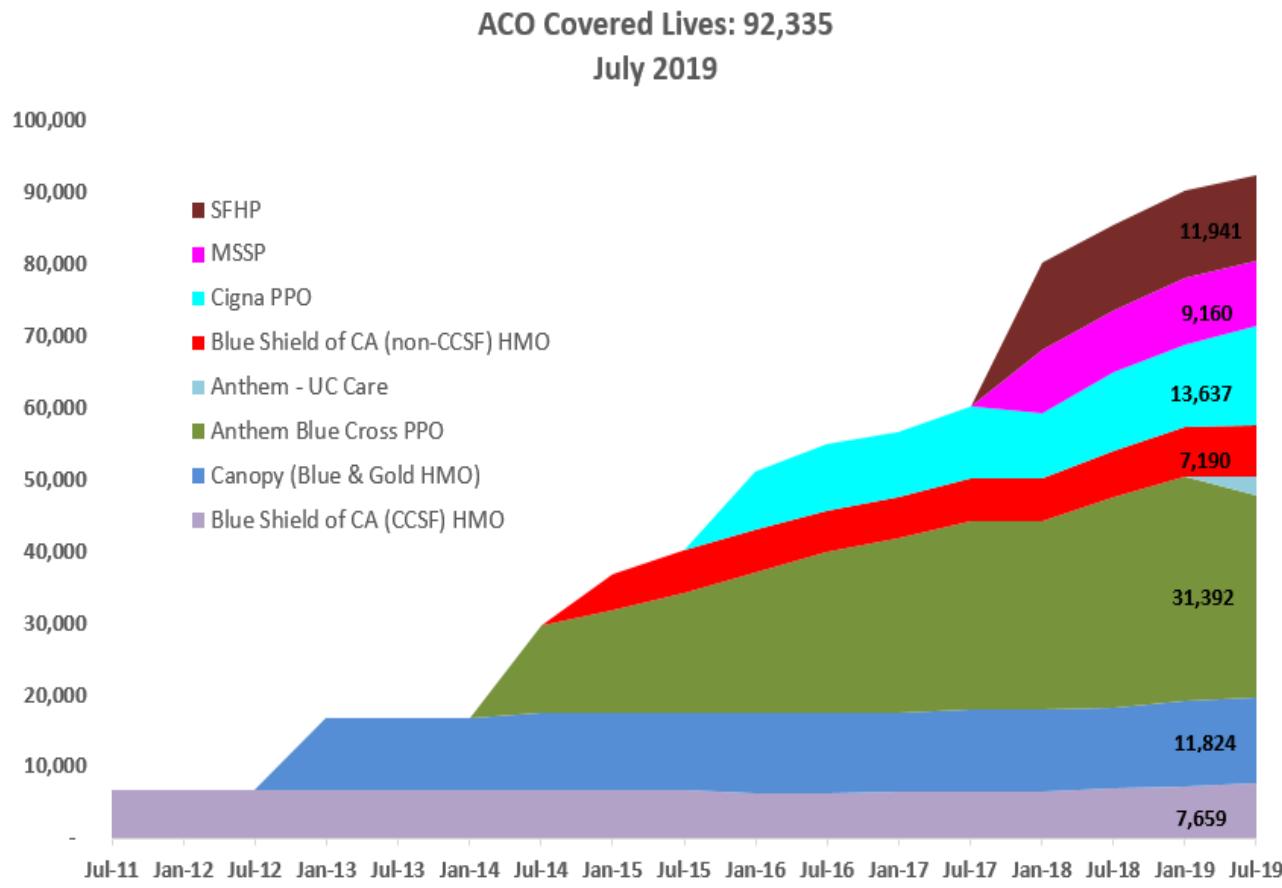


From a Health System
to a Health Network



UCSF Population Health

And primary care investments





Satisfying Local Demand for Care

Canopy Health

20 Renowned Hospitals, Nearly 5,000 Physicians, and Dozens of Care Centers Across the Bay Area

UCSF Health

UCSF Benioff Children's Hospitals

**SAN RAMON
REGIONAL MEDICAL CENTER**
JOHN MUIR HEALTH PARTNER

**GOOD SAMARITAN
HOSPITAL**
Part of Good Samaritan Health system

**JOHN MUIR
HEALTH**

marinhealth.

**Hill
Physicians**

**REGIONAL
MEDICAL CENTER**
Part of Good Samaritan Health system

Dignity Health.

**Washington Hospital
Healthcare System**

**SONOMA
VALLEY HOSPITAL**
SONOMA VALLEY HEALTH CARE DISTRICT

**MERITAGE
MEDICAL NETWORK**

**ALAMEDA
HEALTH SYSTEM**

**SCCIPA
Santa Clara County IPA**



UCSF Health





High Value System of Care

To meet patient needs

Hospitals

Digital

Physicians

Staff

Post Acute

Convenient Care





Partnering with Hospitals

To serve more people

UCSF Health

- Transplant
- Neurosurgery
- Cell Therapy
- Complex care



- Acute Rehabilitation
- Adolescent Psychiatry
- Cardiothoracic Surgery
- Headache

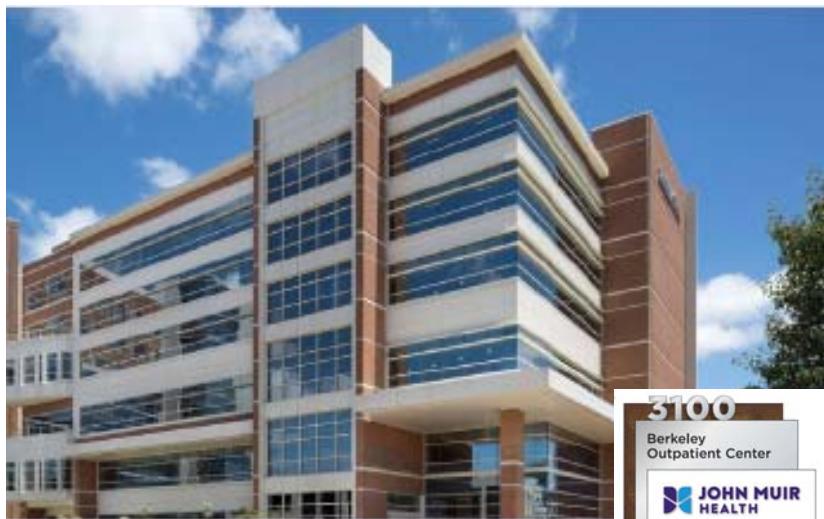
**AFFILIATE
PARTNER**

UCSF Health



Expanding Outpatient Services

At our core sites and in the community



Berkeley Outpatient Center (2018)



Outpatient Center, UCSF Benioff Children's Hospital Oakland (2018)



Washington Hospital Health System

Highlight

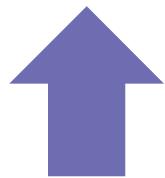


- Located in Fremont, CA | District Hospital
- 560 Aligned Physicians
- Initiated partnership in 2013

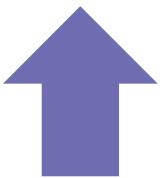
Collaboration

Cardiac Surgery
Liver Transplant
Cancer Center
NICU Management

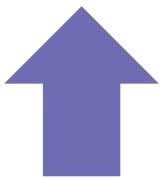
Pediatric Hospitalists
Pediatric Specialties
Prenatal Diagnostic Center



Services & Quality



Access locally & at UCSF



Market Share & Revenue



Washington Hospital Health System

Highlight

**We believe in
the best cancer care
for the community.**

David J. Lee, MD and Bogdan Eftimie, MD



Washington Hospital Healthcare System **UCSF** Health

Working together – Healing together

**We believe in
advanced prenatal care
for your baby.**

Jacquelyn Chyu, MD



Washington Hospital Healthcare System **UCSF** Health

Working together – Healing together

**WE BELIEVE PREMATURE BABIES DESERVE
A SPECIAL PLACE IN OUR COMMUNITY.**

James McGuire, MD, MPH



Washington Hospital Healthcare System **UCSF** Benioff Children's Hospitals

Working together – Healing together



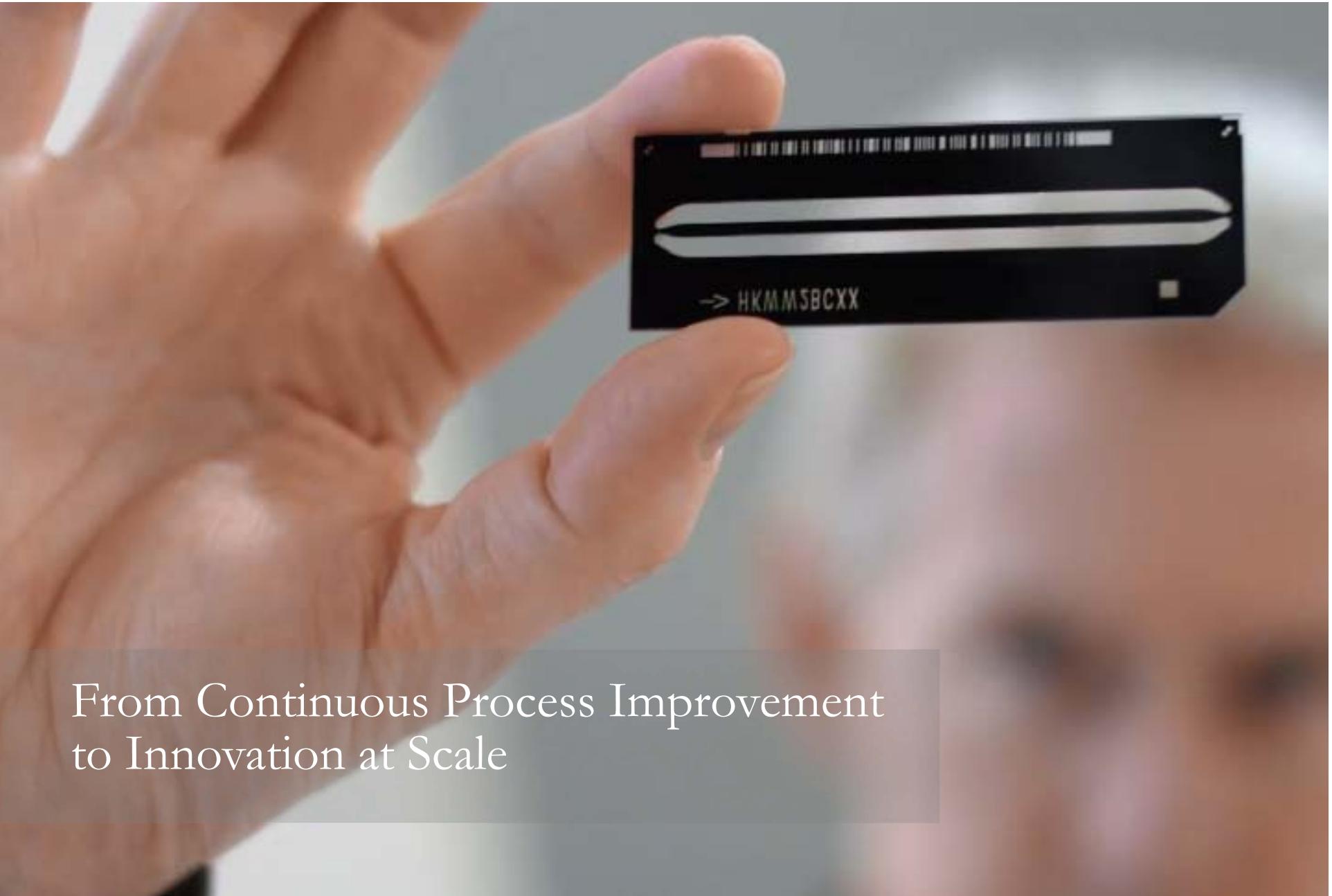
UCSF Health Network

Vision 2025 Goals

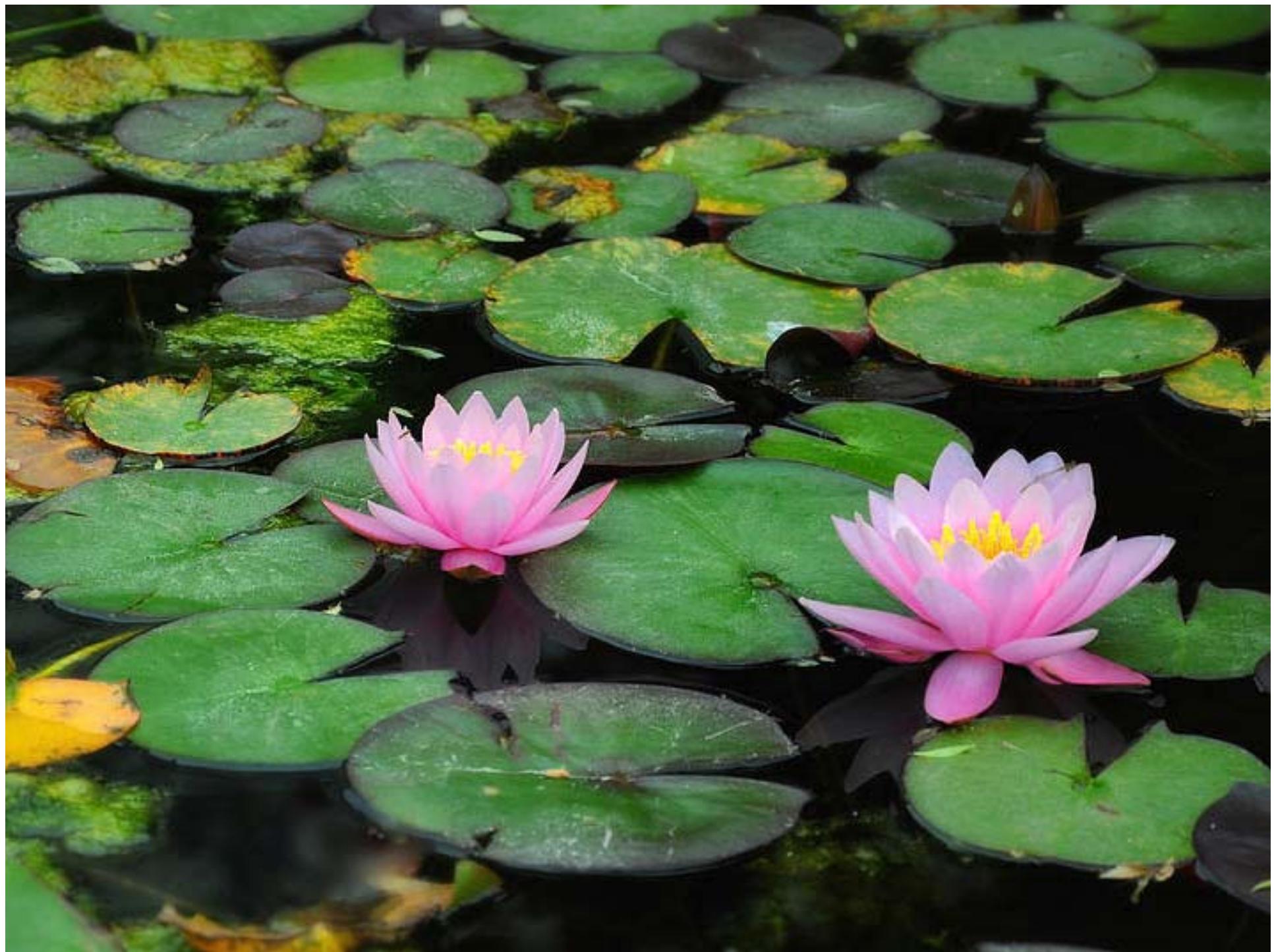


Work with our partners to deliver the right care in the right place at the right time

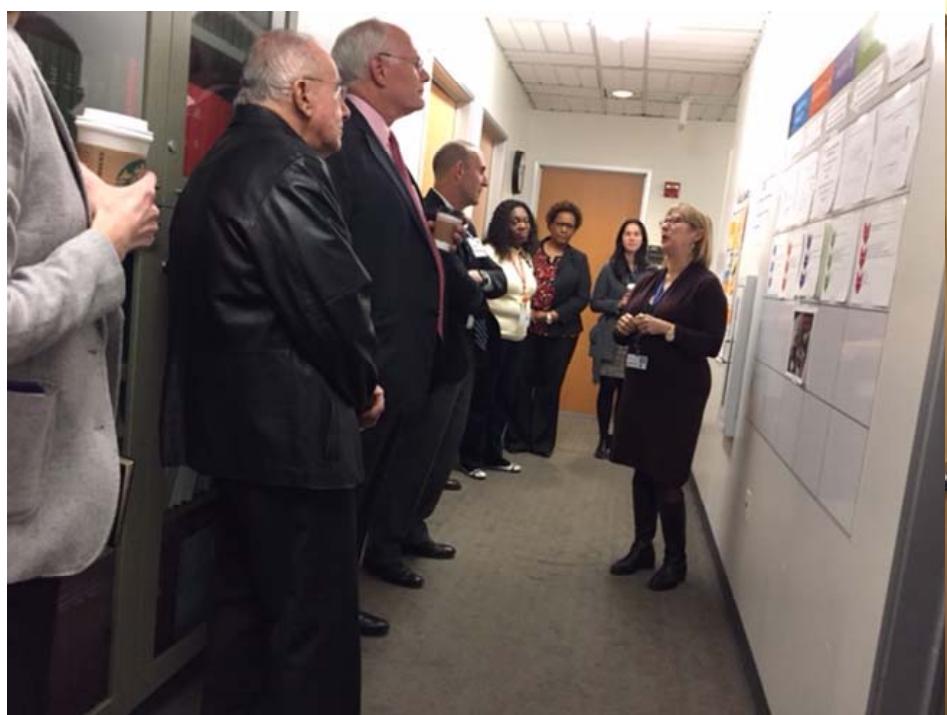
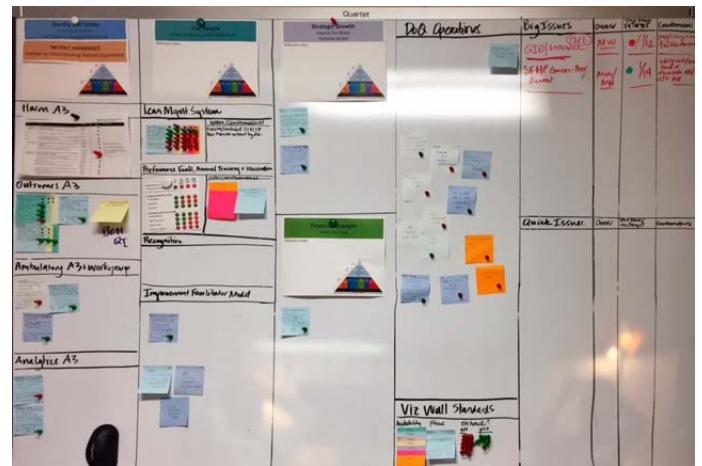
- Ensure that no one needs to drive more than 20 miles to access UCSF care in the Bay Area
- Develop intentional strategies to create value for UCSF Health and our strategic affiliates
- Further expand primary and specialty care capabilities throughout the network



From Continuous Process Improvement
to Innovation at Scale

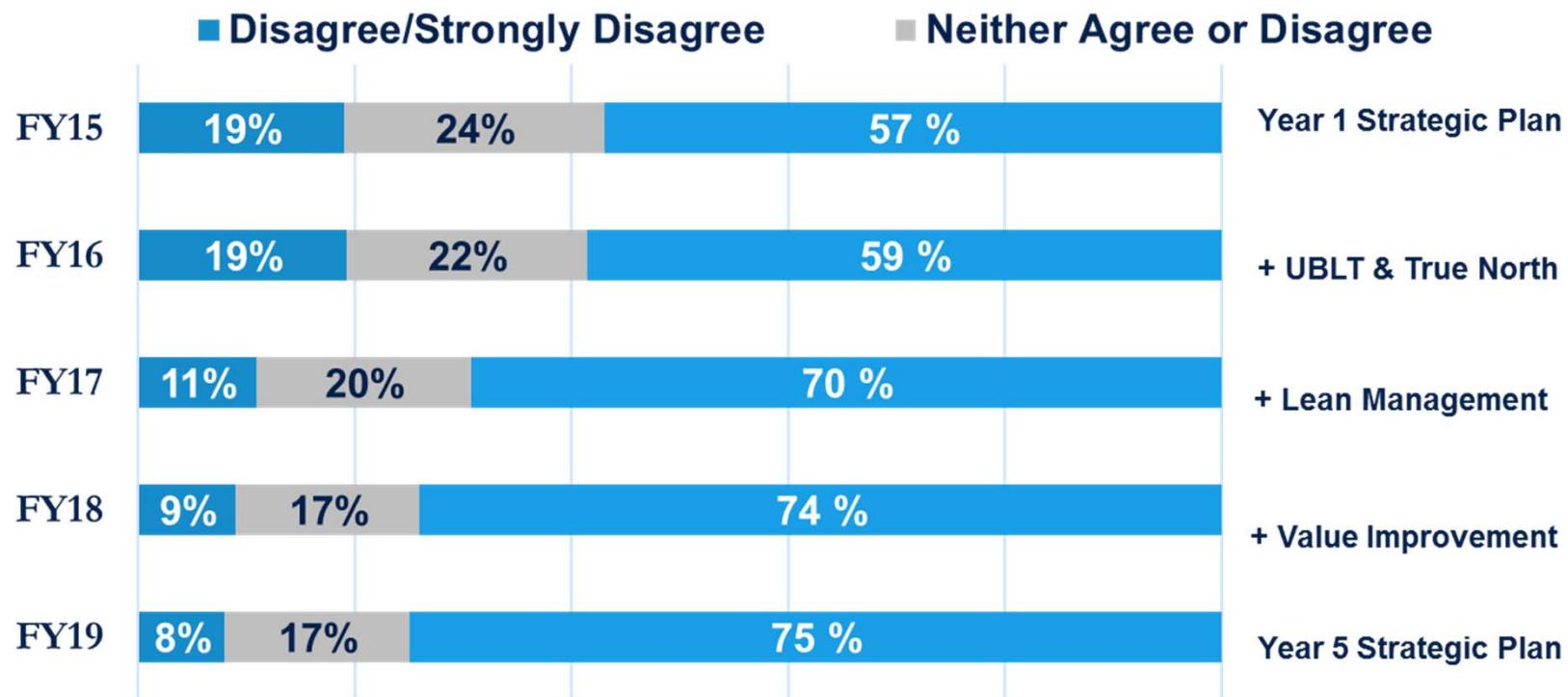








A UCSF Culture of CPI

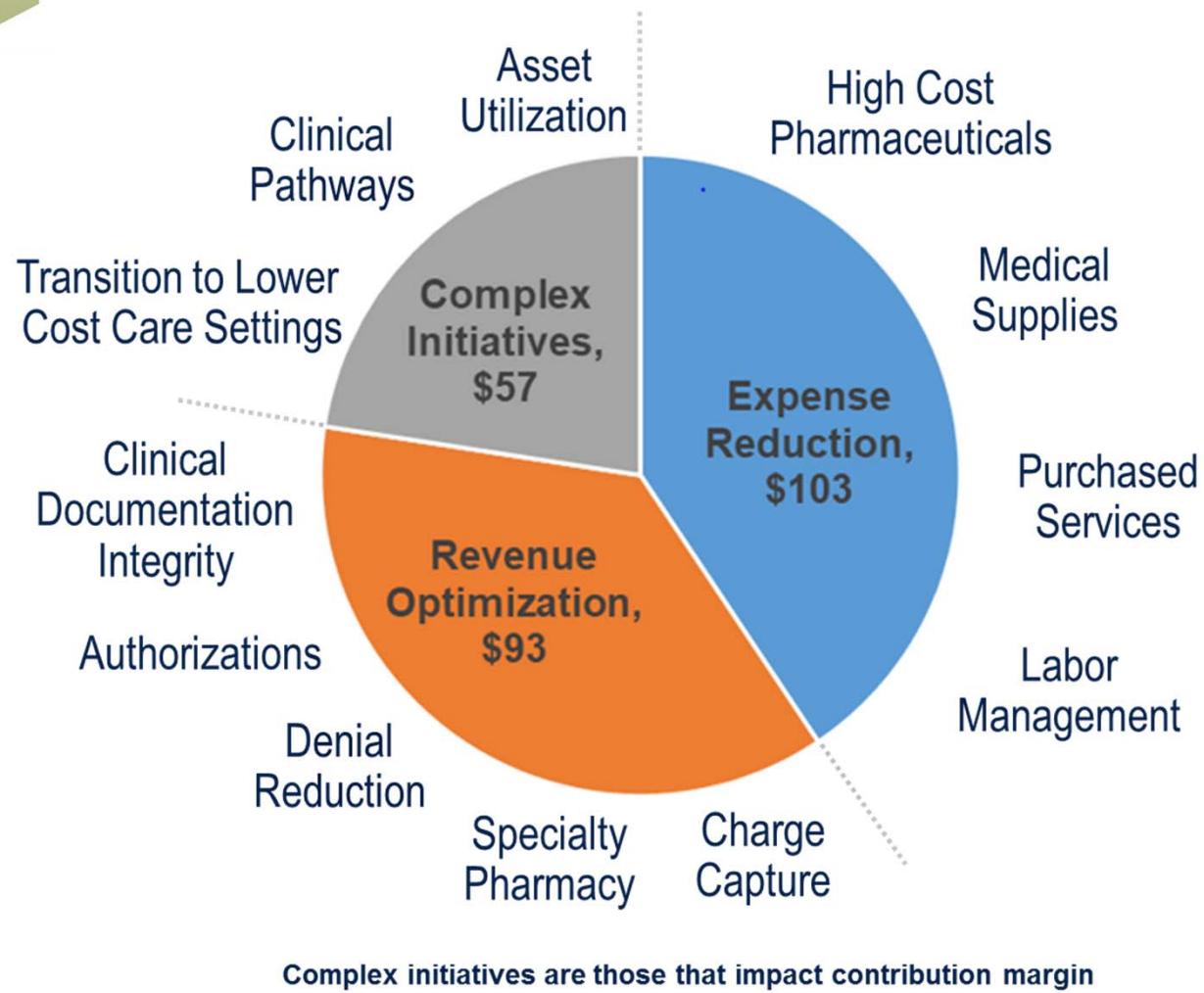


Based on 5 point scale. "Disagree/Strongly Disagree" and "Agree/Strongly Agree" were combined.
Produced by UCSF Health Experience. West Bay



Value Improvement: \$253M

FY18-19





Innovation at Scale

Vision 2025 Goals



Be a national leader in accelerating consumer-centric innovations

- Design and implement a coordinated digital healthcare delivery system for improved value
- Expand partnerships with established and non-traditional players to create both 'sustaining' and 'disruptive' innovations



Vision 2025

Appointment options at every patient's fingertips

MarinHealth
Outpatient Center
Same day available

Walk in urgent
care option near you
Same day available

Telehealth

*Click now for a consult with an
available telehealth provider*

Closest affiliated ED
95 minute wait time





The Power of Partnership

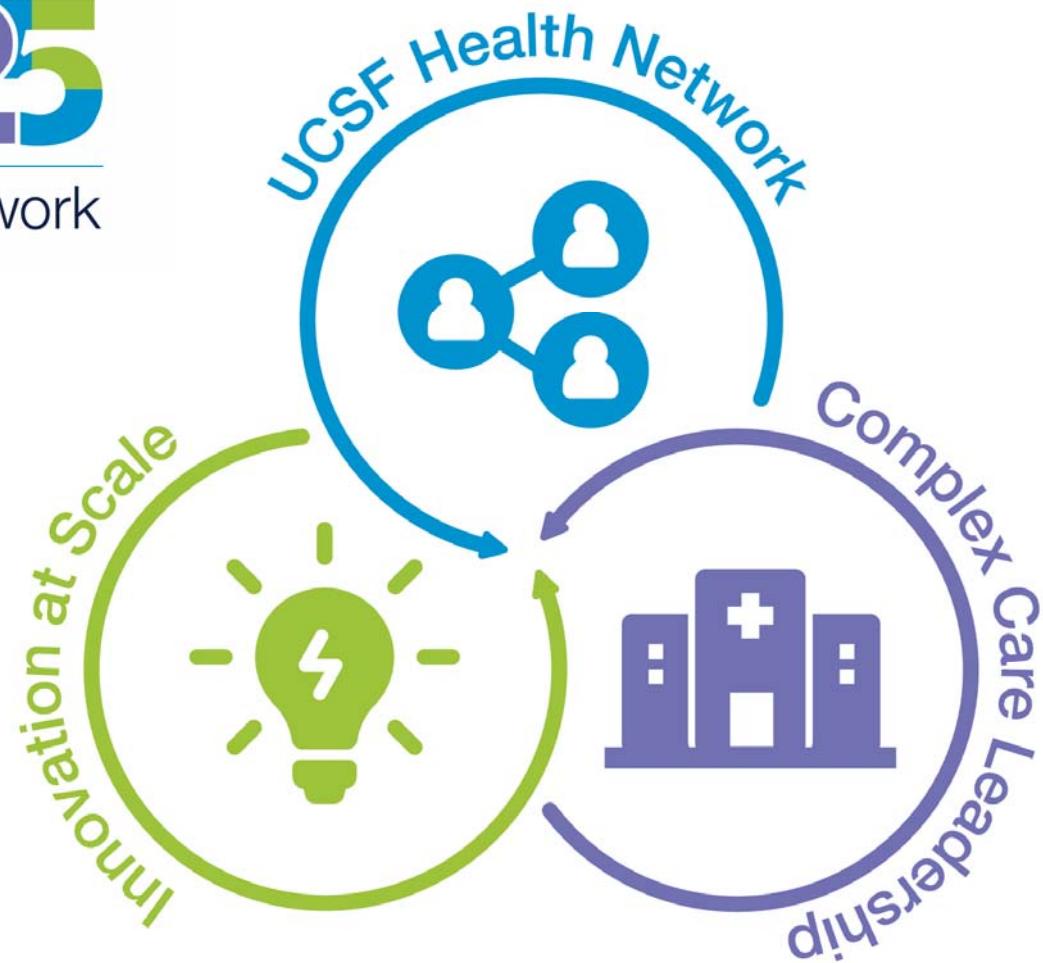


Advancing the Health Network

Vision 2025 will optimize UCSF Health and its affiliate network to reach more patients with high-quality, equitable and appropriate care, ultimately elevating the health of our entire community.



Advancing the Health Network





UCSF Health

Email questions to Vision2025@ucsf.edu