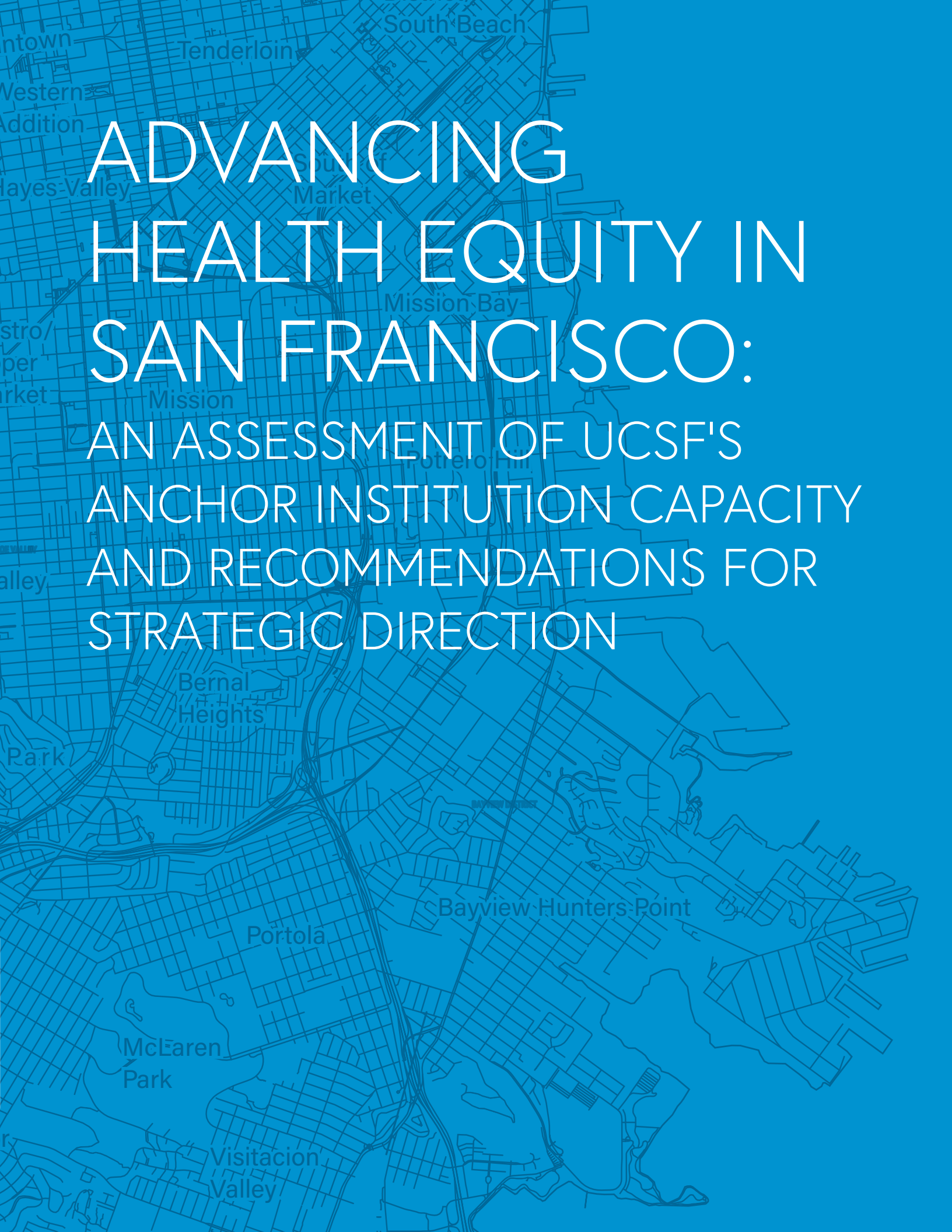


# ADVANCING HEALTH EQUITY IN SAN FRANCISCO:

## AN ASSESSMENT OF UCSF'S ANCHOR INSTITUTION CAPACITY AND RECOMMENDATIONS FOR STRATEGIC DIRECTION

# ADVANCING HEALTH EQUITY IN SAN FRANCISCO:

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Report for the
UCSF Anchor Institution Steering Committee
of the Center for Community Engagement

Authored by Raquel Pinderhughes, Ph.D, with
An Bui, Brian Alexander, Benjamin King, Emily McCaffrey and Tsuyoshi Onda

Commissioned by UCSF Executive Vice Chancellor and Provost
and The San Francisco Foundation

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2019

UC San Francisco's anchor institution initiative is endorsed by UCSF leadership, including the executive vice chancellor and provost, senior vice chancellor for finance and administration, vice chancellor for University Relations and Strategic Communications, vice chancellor for Diversity and Outreach and the executive vice dean of the School of Medicine.

The project is led by Dr. Howard Pinderhughes, whose work focuses on the social determinants of health and the lasting impact of violence on youth in urban communities. Dr. Pinderhughes initiated the idea of the anchor frame as a strategy to address health inequity, diversity and inclusion at the 2015 UCSF School of Medicine Leadership Retreat.

This report was made possible by the UCSF Center for Community Engagement. The mission of the UCSF Center for Community Engagement is to build collaborative relationships between UCSF and the community, promoting civic engagement, fostering community health and well-being, and enhancing the environment for education, patient care, research and employment at UCSF. The Center serves as a bridge between UCSF and local communities, emphasizing partnerships that value and respect the assets and diversity of both.

The report was written by a team led by Professor Raquel Pinderhughes, working with five research assistants: An Bui, a consultant, and four students from the Goldman School of Public Policy, enrolled in "Introduction to Policy Analysis" at UC Berkeley: Brian Alexander, Benjamin King, Emily McCaffrey and Tsuyoshi Onda.

The report is the first phase of a multi-phase initiative to establish UCSF as an anchor institution. Phase One, this assessment and report, will be followed by Phase Two, a strategic action plan informed by the findings of the Phase One report.

Phase One was made possible with funding and support from The San Francisco Foundation. We thank the Foundation for its support but acknowledge that the findings and conclusions presented in this report are those of the authors alone and do not necessarily reflect the opinions of the Foundation.

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Raquel Pinderhughes, Ph.D.

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North Beach
Marina
Russian Hill
Presidio
Chinatown
Pacific Heights
Nob Hill
Seacliff
Presidio Heights
Japantown
Tenderloin
Lincoln Park
Inner Richmond
Western Addition
Lone Mountain /USF
Outer Richmond
Hayes Valley
South of Market
Golden Gate Park
Haight Ashbury
Castro/ Upper Market
Mission
Inner Sunset
Twin Peaks
Sunset/Parkside
Noe Valley
Bernal Heights
Glen Park

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# Foreword

We live in dynamic and challenging times, which have placed the Bay Area at a crossroads. Our regional economy has experienced unpredented growth in recent years, yet this prosperity is being unevenly distributed. We now have a record number of billionaires living in our community and, at the same time, segments of the Bay Area are recording the highest levels of income inequality anywhere in the country.

In San Francisco, the rising tide is not lifting all boats. Research shows that significant disparities and inequities in health outcomes exist for San Francisco's most under-resourced communities along race and geographic lines, placing our residents and families at risk. Improving health outcomes requires us to focus our attention on patients' lives both inside and outside of the doctor's office. Improving health outcomes requires removing obstacles to good health, including the impediments of poverty and discrimination, which are associated with reduced access to jobs with fair pay, education, housing, safe environments, and health care.

UC San Francisco (UCSF) and the San Francisco Foundation (SFF) sense the urgency of the situation and refuse to consider this scenario as irreversible destiny. United in a commitment to identify untapped resources that an anchor institution such as UCSF can leverage to uplift a community, UCSF and SFF set forth to collaborate on this report. The question to be explored was how else UCSF – which for more than 150 years has been central to employment, health care and public service in San Francisco – can leverage its resources to improve the health of the city's underserved and under-resourced communities and to promote health equity. This report, the first step in the development of an anchor institution strategy for UCSF, identifies specific approaches available to the University to further its impact as an economic catalyst, thereby increasing its ability to mitigate, and reverse, the city's growing inequalities. But the value of this report goes beyond UCSF and – with the guidance and expertise of SFF – can serve as a blueprint for San Francisco's other major institutions.

As a community foundation serving five Bay Area counties – Alameda, Contra Costa, Marin, San Francisco, and San Mateo – SFF has served the people of the Bay Area since January 1948. SFF is committed to advancing greater racial equity and economic inclusion for everyone in the Bay Area. SFF continues to bring together community partners and experts to unlock our collective knowledge and resources and work toward the common goal of improving the health and well-being of the region's communities.

UCSF is a leading university dedicated to *advancing health worldwide* through preeminent biomedical research, graduate-level education in the life sciences and health professions, and excellence in patient care. UCSF, part of the University of California system, has long been a leader in addressing health disparities through a broad spectrum of programs and initiatives, including a partnership of more than 140 years in clinical care and research at Zuckerberg San Francisco General Hospital; an engagement of more than 30 years with the San Francisco Unified School District through the UCSF Science and Educational Partnership; the co-founding of the San Francisco Health Improvement Partnership (SFHIP), a cross-sector collective impact initiative designed to improve the health and wellness of San Franciscans; the launching in 2016 of the San Francisco Cancer Initiative (SF CAN), in collaboration with a spectrum of community partners, to combat the city's

leading cause of death; the formation of the Child Health Equity Institute through UCSF Benioff Children's Hospitals in San Francisco and Oakland to specifically address health inequities among children; and the EXCEL job training and internship program for low-income San Francisco residents, among many other programs. In addition, the UCSF Helen Diller Medical Center treats more low-income hospital patients on Medi-Cal than any other hospital in San Francisco.

By coming together, UCSF and SFF are joining a growing nationwide movement committed to positively impacting the social determinants that impact the health of our country's underserved and under-resourced communities. Increasingly popular among hospitals, universities and government agencies, an anchor institution strategy is a deliberate plan adopted by place-based, mission-driven entities to use business operations to improve health and social welfare in their local communities. Precisely because UCSF is an anchor institution with deep roots in San Francisco, the University can make a commitment to applying its long-term, place-based economic power, alongside its human and intellectual resources, to better the long-term health and welfare of San Francisco's most under-resourced communities.

An anchor institution strategy to transform the social, economic and health landscape of the most under-resourced communities holds great promise. With the completion of this anchor assessment report, UCSF and SFF – in collaboration with community leaders – will further pursue the concept and consequences. We aspire to be the catalyst for a major citywide initiative that can alter how anchor institutions in San Francisco conduct their business, promoting the health and well-being of the city's most under-resourced communities as well as sustaining and maintaining our diverse communities.

**Sam Hawgood**
Chancellor
UC San Francisco

**Howard Pinderhughes**
Chair
Anchor Institution Steering Committee

**Fred Blackwell**
Chief Executive Officer
The San Francisco Foundation

# Anchor Institution Assessment Steering Committee Members

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**Victor Rubin**, Vice President for Research at PolicyLink

**Joaquin Torres**, Deputy Director, San Francisco Office of Economic and Workforce Development (Director as of August 2018)

# Executive Summary

This "Advancing Health Equity in San Francisco: Assessing UCSF's Anchor Institution Capacity" report is the first phase in implementing UC San Francisco's long-term commitment to the anchor institution strategies of workforce development, procurement and community investment directed toward the goal of advancing health equity in San Francisco. The purpose of this report is to present a transparent and accurate baseline of UCSF's internal and external landscape of anchor institution strategies and propose recommendations for strategic directions. The report is intended to promote honest and meaningful conversations among UCSF executives, staff, faculty, trainees and the community about how to make UCSF as intentional and effective as possible in its policies and practices as an anchor institution committed to advancing health equity in San Francisco, starting with the most under-resourced geographic communities.

To achieve the goal of advancing health equity, UCSF must act in concert and partner with community organizations, city agencies, the private sector and other anchor institutions in the city. These partnerships will help minimize redundancy, use resources more efficiently, and maximize the collective impact on the social determinants of health in San Francisco. This report will serve as a foundational tool for Phase Two of the initiative, when institutional leaders will convene and engage a wide range of community stakeholders to identify and adopt common goals and objectives and develop a clear strategic plan to implement the anchor institution strategies.

This report was written over a 12-month period in which we conducted more than 50 interviews with representatives from community organizations, nonprofits, city agencies, health care institutions, community foundations and others, as well as with executives, staff and faculty from the UCSF Health and UCSF campus and the University of California Office of the President (UCOP). The work was guided by the Anchor Institution Assessment Steering Committee, which is composed of both UCSF and community stakeholders. In addition, we used existing data and reports from city agencies, local community organizations, community foundations and more in order to provide readers with an overview of health and economic disparities in San Francisco.

This report will be posted to the UCSF Center for Community Engagement website, where it has been structured and designed to function as a living document that can be revised to include feedback from key stakeholders. This will ensure that the work being done by other anchor institutions and community organizations can be added to the UCSF Anchor Institution document and archives. {TO COME}

To understand UCSF's internal and external landscape, as it relates to anchor institution strategies, we chose to present what we learned from stakeholder interviews and research through a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis of the three anchor institution strategies for UCSF: (1) workforce development, (2) procurement and (3) community investment.

Building from the SWOT analysis, we provide the following overarching recommendations for UCSF's workforce development, procurement and community investment strategies. Steps to achieve these recommendations are explained in further detail within the report.

# UCSF Workforce Development Recommendations

**Recommendation I: Increase UCSF's Capacity to Train, Hire and Promote Under-Resourced Populations**

**1.1** Institutionalize local hiring goals (voluntary or otherwise) in collaboration with the UCSF Affirmative Action Plan targeting low-income populations or with a geographic focus on high-need and high-poverty neighborhoods in San Francisco (i.e., the southeastern neighborhoods of Bayview–Hunters Point, Visitacion Valley, Excelsior, Portola and Outer Mission, as well as the neighborhoods of Chinatown, Tenderloin and the Western Addition), and adopt policies and practices that incentivize hiring managers.

**1.2** Develop a robust human resources (HR) data infrastructure for both UCSF Medical and campus that will allow internal analysis of job turnover, job vacancy, recruitment costs and more, in order to support workforce development efforts.

**1.3** Foster a more intentional collaboration between HR departments, hiring managers and workforce development programs to identify entry-level opportunities across the institution in various sectors (e.g., health care, food service, tech support, etc.) and connect opportunities to community and internal workforce development program graduates.

**1.4** Develop an efficient communication system among UCSF HR departments and workforce development programs in order to provide ongoing retention and support services to program graduates.

**1.5** Expand existing internal advancement training programs targeting entry-level, low-wage employees for lateral and upward career mobility within UCSF. Programs could provide frontline employees with career coaching, on-site hard and soft skills training, job shadowing and mentorship, case management and service referral, and educational supports such as college instruction at the workplace, release time and tuition advancement, remission or educational loans. Promising practices are discussed later in this report.

**Recommendation II: Strengthen UCSF's Workplace Climate and Cultural Competency**

**2.1** Conduct evaluation of workforce programs that include program participants and related departmental supervisors to understand internal workplace environment, needs and challenges.

**2.2** Conduct evaluation of employee turnover and involuntary separation to (1) understand challenges facing UCSF employees, (2) identify populations that are especially vulnerable, and (3) create support programs targeting those populations to improve retention.

**2.3** Continue to identify workplace issues around racism and discrimination through HR data, employee committees, surveys and interviews

**2.4** Continue to provide campus-wide equity and inclusion trainings, targeting departments with workforce program participants or where there is clear racial disparity in management.

**2.5** Collaborate with city agencies and other anchor institutions to align racial equity definition and goals.

**Recommendation III: Increase Collaboration Among and Across Community Partners and Stakeholders**

**3.1** Leverage existing partnerships among UCSF, community organizations and other health care institutions in the city to understand current best practices, opportunities, and challenges facing workforce development programs in the city's health care sector.
**3.2** Institute a continual assessment of community workforce development needs.
**3.3** Convene representatives from UCSF, community organizations, city agencies, workforce intermediaries, community foundations and other anchor institutions in the city to explore opportunities for scaling existing workforce development initiatives.
**3.4** Ensure community representation in the governance of the Anchor Initiative.
**3.5** Leverage funds from the institution, city agencies and community partners to initiate and sustain a citywide partnership.

**Recommendation IV: Increase Effectiveness of the Education Pipeline for Under-Resourced Populations**

**4.1** Continue efforts under way as part of the Differences Matter Group #6 to identify challenges, opportunities, barriers and alignment opportunities among UCSF education pipeline, outreach and pathway programs. This group includes longstanding flagship initiatives such as the Center for Science Education and Outreach and the Science and Health Education Partnership, as well as programs in Oakland and Fresno.
**4.2** Align UCSF education pipeline, outreach and pathway programs with local, place-based initiatives to tackle education attainment and achievement disparity, especially among and for under-resourced populations in the city (e.g., African American, Pacific Islander and Latino youth), and help fill in programmatic or resource gaps.
**4.3** Identify opportunities to promote academic literacy for under-resourced youth and adult populations (15- to 24-year-olds) and adult populations.
**4.4** Partner with the San Francisco Unified School District (SFUSD), City College of San Francisco, San Francisco State University (SFSU) and other educational institutions to identify skills needed for employment, and embed skill-building goals at different education levels into the school curriculum.
**4.5** Connect education pathway programs with entry-level employment opportunities at UCSF and connect these opportunities to career pathways over time.

## UCSF Procurement Recommendations

**Recommendation I: Define UCSF's "Movable Spend" (purchasing categories that can be sourced from small, local businesses that are owned by or employ under-resourced populations).**

**1.1** Begin tracking category of spend for all purchases as well as spending with micro businesses and quantitative metrics for diverse procurement.
**1.2** Identify categories of spend within UCSF Supply Chain Management that are well suited for increased spending with small and diverse vendors (e.g., food services, laundry and office supplies).
**1.3** Speak with department-level UCSF purchasing decision makers to identify opportunities for streamlining the involvement of diverse businesses in the procurement process.

**Recommendation II: Institutionalize Local and Inclusive Purchasing Through the Adoption of Explicit Goals, Policies and Practices**

**2.1** Leverage UCSF's influence on UCOP to adopt and add strong language around local and inclusive purchasing, similar to the sustainable food purchasing goal.
**2.2** Implement an internal communication strategy to educate department-level purchasing managers and administrators on the institution's supplier diversity goals and programs. The supplier diversity program could be framed as a strategic and business imperative that will provide a competitive advantage to the organization, rather than a quota system or social program.
**2.3** Incorporate local and diverse spending goals into performance metrics for managers and executives. For example, Grady Health System, a large academic health system serving the Atlanta metro area, incorporated the organizational goal of 20 percent spend with minority businesses into performance metrics for the health system's clinical and nonclinical vice presidents.
**2.4** Incorporate small, local and diverse vendor participation requirements in the bid solicitation process. For example, University Hospitals in Cleveland, Ohio, require that all contracts for more than $20,000 must include at least one local or minority or women business enterprise (MWBE) in the bidding process. Another example is MD Anderson Cancer Center, which stipulates that all contracts under $100,000 are required to have a certain number of diverse vendors per bid.
**2.5** Work with current group purchasing organizations (GPOs) to gain access to a wide network of diverse suppliers. Consider future opportunities to work with GPOs to increase opportunities for local small and diverse vendors. For example, Parkland Health and Hospital System in Dallas, Texas, worked with their GPO, Vizient, to add a regional printing company to Vizient's contract portfolio, expanding the business opportunities for that company.

**Recommendation III: Identify Local Business Capacity to Meet "Movable Spend"**

**3.1** Partner with city agencies, small business support organizations and other anchor institutions to understand the current business landscape, opportunity areas and business challenges.
**3.2** Create a database of vetted diverse businesses from target communities that can serve as a guide for purchasing decision makers who wish to support UCSF's Anchor Initiative but do not have the resources or time to evaluate businesses on their own. This database may be built from UCSF Campus Supply Chain Management's "SupplierIO" program.

**3.3** Solicit small business referrals from other Bay Area anchor institutions such as Kaiser Permanente.

**Recommendation IV: Connect with Local Businesses and Support Capacity-Building Activities**

**4.1** Explore potential partnerships and opportunities for mentor-protégé programs designed to prepare local small businesses to meet the demand of a large hospital system. Some examples include:

- The MD Anderson Cancer Center in Houston, Texas, has an in-house mentor-protégé program that connects large vendors to small, diverse businesses. The partnership allows small vendors to develop skills and to understand the health system's needs and culture.
- The six-month paid internship program for licensed general contractors managed by Greenville Health System, a not-for-profit academic health care system in South Carolina, provides a good example. The program pairs a minority general contractor with an employee from the health system's construction team, and provides the minority contractor with experience and exposure to the health care field. After the internship, the minority contractor receives one or more bids equaling $1 million in projects.
- The University of Chicago Medicine, an academic medical center, has a supplier mentorship program that connects strategic manufacturers with smaller minority vendors in order to offer better pricing.

**4.2** Participate in or organize outreach events for local small and diverse vendors to learn about UCSF's procurement culture and practices, connect with buyers and decision makers, and learn about upcoming contracting opportunities. For example, Saint Francis Care, an integrated health care delivery system in Connecticut, hosts an annual health care supplier diversity event to educate small and diverse businesses about how to do business in the health care field. One possible opportunity is to ask the UCSF Lab Manager Steering Committee to integrate diverse business outreach into its annual research vendor showcase.

**4.3** Explore opportunities to pool demand for products and services produced by diverse and local small businesses.

# UCSF Community Investment Recommendations

The recommendations below are primarily drawn from the Hospitals Aligned for Health Communities Toolkit Series, "Place-based Investing" (2017 report).[313]

**Recommendation I: Assess Existing UCSF Investment Landscape**

**1.1** Review current investment culture:
- What are the values and goals of your institution?
- How can investments support your institution's health promotion objectives?
- Are you currently invested in companies or financial instruments that create or reinforce health problems that your institution is working to address?
- Who can support and build momentum for place-based investment internally?

**1.2** Review existing investments and investment portfolio:
- What is in the existing portfolio?
- Has the portfolio been inventoried to identify investments at cross-purposes with the mission of your institution?
- Has the portfolio been inventoried to identify existing place-based investments?
- Are there investment managers associated with your portfolio who can help you reallocate to place-based investments or establish new place-based investment products?
- Are there current investments that create or reinforce the health problems that UCSF is working to solve?
- What is the asset allocation and how can it be adjusted to incorporate a place-based investment carve-out?
- What is the desired annual rate of return for unrestricted assets?
- Does your institution have relationships with local community banks or credit unions?
- What opportunities exist for shifting deposits to additional local community banks and credit unions?

**1.3** Review existing staff capacity and knowledge:
- What are your investment advisors' capabilities around sustainable, responsible and impact investing?
- To what extent is your investment staff educated and experienced in sustainable responsible and impact investing?
- What are the capacities and offerings of your existing investment managers around place-based investing?
- What is the role of governance in setting or evaluating investment priorities or goals?
- To what extent is your board educated on place-based investing?
- Is there a dedicated place-based investment committee?

**1.4** Review existing investment policies and governance structure
- What is the primary role of the investment portfolio in supporting health system operations?
- Are there environmental, social and governance (ESG) criteria for the portfolio?
- Does the institution have a policy concerning sustainable, responsible or impact investing?
- Do the institution's policies permit place-based investment allocations?

**Recommendation II: Develop a UCSF Community Investment Strategy with Community Input**

**2.1** Identify goals and motivations for pursing community investment.
**2.2** Define key principles to achieving those goals, and the investment vehicles that are most suited to the goals.
**2.3** Identify key institution champions and staff responsible for managing community investments.
**2.4** Designate a percentage of assets within investment portfolio or investable reserves for community investments.
**2.5** Designate funds for community investments from surplus returns from the investment.
**2.6** Create a community board composed of members of under-resourced populations that can provide guidance on community investments in high-need, high-poverty areas.

**Recommendation III: Build Internal and External Relationships**

**3.1** Foster working relationships between community outreach and investment staff.
**3.2** Engage key nonprofit partners on their long-term plans and investment needs.
**3.3** Join impact investment networks and engage in collaborative community investment initiatives.
**3.4** Build a relationship with a financial intermediary, such as a community development financial institution (CDFI).
**3.5** Connect investment advisers with training opportunities on sustainable, responsible and impact investing.
**3.6** Foster working relationships with community members from high-need, high-poverty areas.

**Recommendation IV: Implement the UCSF Community Investment Strategy**

**4.1** Allocate assets from investment portfolio for place-based investments.
**4.2** Increase the asset allocation incrementally.
**4.3** Make investments that complement community benefits and other anchor institution strategies.
**4.4** Connect capacity building with direct lending.
**4.5** Move cash and cash-equivalent assets into local banks and credit unions.
**4.6** Monitor and track impact.

SECTION I

# ADVANCING UCSF'S ANCHOR INSTITUTION CAPACITY

# *The University of California, San Francisco (UCSF)*

UCSF has long been a leader in addressing health disparities to improve health and health care for all. UCSF's scientists, clinicians and trainees work with community-based organizations, city and state governments, private industry and others to produce health solutions that benefit patients and populations.

In his 2017 State of the University address, UCSF Chancellor Sam Hawgood announced that one of the key UCSF institutional priorities in its $5 billion fundraising campaign is advancing health for everyone, everywhere, by "partnering to achieve health equity."

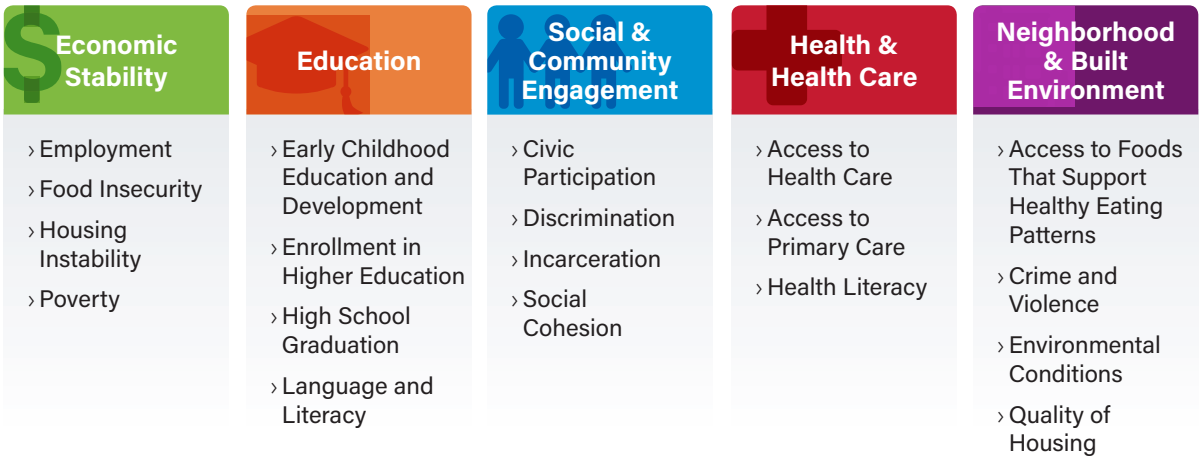
The Office of Disease Prevention and Health Promotion (ODPHP) defines health equity as the "attainment of the highest level of health for all people."[1] Achieving health equity requires valuing every individual equally, with focused and ongoing societal efforts to address inequalities, historical and contemporary injustices, and health and health care disparities."[2] Health disparities are particular differences in health that are closely linked with the "social determinants of health," which are the conditions in which people are born, grow, live, work and age.[3]

The social determinants of health can be categorized into the following factors: socioeconomic status, education, neighborhood and physical environment, social support networks and health care (Figure 1).[4] Socioeconomic and environmental conditions directly impact health outcomes. Equally important, these factors shape individual behavioral patterns. Combined, socioeconomic conditions, environmental exposures and behavioral patterns are estimated to account for 80 percent of health outcomes.[5]

Health disparities adversely affect individuals and groups of people who have systematically experienced or are experiencing greater obstacles to health due to the unequal allocation of power and resources across race, ethnicity, gender, class, sexual orientation and other dimensions of individual and group identity. In this report, we refer to these populations as "under-resourced populations" because these dynamics result in their not receiving the treatment and services they need to promote maximum health and well-being.[6]

Although health care is a relatively weak determinant of health, efforts to improve health in the United States have traditionally looked to the health care system as the key driver of health outcomes.[7] The United States spends more on health care per capita than any other Western

**Figure 1: Social Determinants of Health**




Source: healthypeople.gov/2020/topics-objectives/topic/social-determinants-of-health

country and significantly less on social services.[8,9] U.S. health care spending is currently 18 percent of the U.S. economy, and could possibly increase to 20 percent or more in the next decade.[10] Despite this output of spending on health services, health outcomes in the United States, including life expectancy, mortality and disease burden rates, continue to fall behind other developed countries.[11,12] Racial health disparities are projected to cost U.S. health insurers $337 billion between 2009 and 2018.[13] Thus, while providing access to and improving the quality of health care are essential, achieving health equity requires approaches that specifically address the social, economic and environmental determinants of health.[14]

As one of the leading health science and health care institutions in the Bay Area, and San Francisco's second largest employer, UCSF exerts an important influence on the social, cultural and economic well-being of the San Francisco Bay Area. To promote health equity, UCSF must effectively harness its long-term, place-based economic power and its human and intellectual resources to positively influence the social determinants of health in under-resourced communities in San Francisco, thereby improving the long-term health and well-being of individuals in these communities.

It is precisely because UCSF is an anchor institution with deep roots in San Francisco that it can make such a commitment. Academic health institutions like UCSF have importance and make contributions beyond teaching, researching and providing quality health

### Key steps to achieving health equity

1. **Identify important health disparities.** Many disparities in health are rooted in inequities in the opportunities and resources needed to be healthier. The determinants of health include living and working conditions, education, income, neighborhood characteristics, social inclusion and medical care. An increase in opportunities to be healthier will benefit everyone, but more focus could be placed on groups that have been excluded or under-resourced in the past.

2. **Change and implement policies, laws, systems, environments and practices to reduce inequities in the opportunities and resources needed to be healthier.** Eliminate the unfair individual and institutional social conditions that give rise to the inequities.

3. **Evaluate and monitor efforts using short- and long-term measures,** as it may take decades or generations to reduce some health disparities.

4. **Reassess strategies in light of process and outcomes, and plan next steps.** Actively engage those most affected by disparities in the identification, design, implementation and evaluation of promising solutions.

Source: Braveman P, Arkin E, Orleans T, Proctor D, and Plough A. "What Is Health Equity? And What Difference Does a Definition Make?" Princeton, NJ: Robert Wood Johnson Foundation, 2017. Accessed July 18, 2018. https://www.rwjf.org/en/library/research/2017/05/what-is-health-equity-.html.

care. Health institutions are economic catalysts that have the potential for generating wealth and increasing the health and well-being of under-resourced communities by providing stable, well-paying jobs; stimulating business opportunities; purchasing local goods and services; and investing in social enterprise and services. UCSF is committed to leveraging its business roles as an employer, purchaser and investor to achieve health equity.

In this report we identify how UCSF can strategically link its anchor roles as employer, purchaser and investor to community and economic development efforts by engaging communities as partners in promoting health equity and shaping strategic anchor institution initiatives at UCSF. To do so effectively, UCSF will need to work with many other San Francisco institutions and organizations to collaborate on strategic partnerships and minimize duplication and fragmentation of efforts, in order to deepen the collective impact on the social determinants of health in San Francisco and improve the health and well-being of the city's under-resourced populations.

# *Health and Economic Disparities in San Francisco*

Economic barriers to health and racial health inequities are two foundational issues affecting San Francisco communities, and are part of a persistent, consistent pattern that emerges when examining economic and health data by race and ethnicity.[15] The following section focuses on existing disparities in San Francisco through an examination of various economic and health indicators. In order not to underestimate the size of the gap between advantaged and disadvantaged groups, disadvantaged groups are not compared with the general population but with advantaged groups.[16] Due to data limitations, some of the findings presented are not fully disaggregated, which can mask important differences among racial sub-groups.

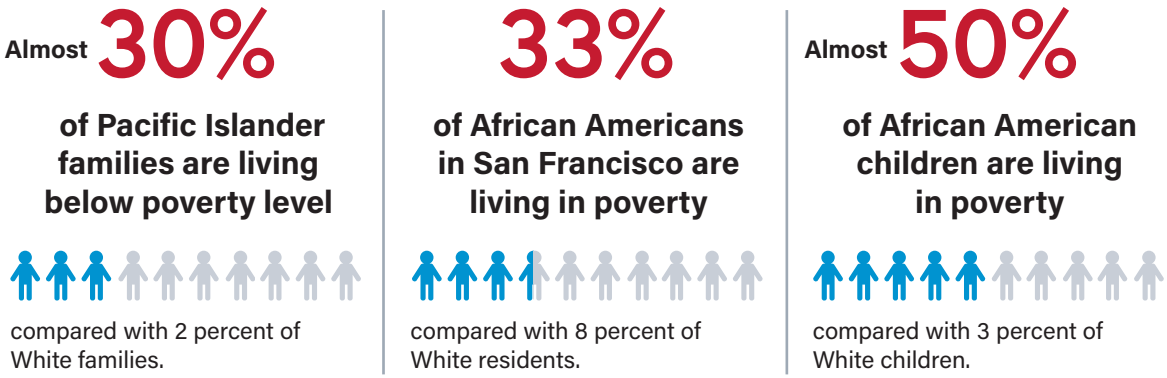
## Economic Disparities Among Racial/Ethnic Groups

- San Francisco has one of the highest rates of income inequality in the nation.[17] The city is home to almost 30 billionaires, yet close to 30 percent of San Francisco families are living below the city's self-sufficiency standards ($59,652).[18,19] Additionally, 13 percent of San Franciscans are living below the federal poverty level, which in 2017 was $20,420.[20]
- San Francisco has the fastest growing income gap between the wealthiest households (the top 5 percent of earners) and the middle class earners (the middle 20 percent of earners): Today, a person in the top 5 percent of earners in San Francisco makes an average of $634,300 more than a counterpart in the middle-class.[21]
- The average income of the top 1 percent of households in the city averages $3.6 million, 44 times more than the average income of the bottom 99 percent, which is $81,094.[22]
- Median income for African Americans is approximately $29,000, less than half of Hispanic/Latino residents' median household income (approximately $62,000), and little more than one-fourth of the median household income of White residents (approximately $111,000).[23]
- In 2012, of the more than 3,000 children living in public housing, approximately half (1,515) were African Americans, representing 19 percent of the African American children in San Francisco.[24]
- More than 15 percent of African Americans and Pacific Islanders in San Francisco are

unemployed, compared with fewer than five percent of White San Franciscans.[25]

- Less than a quarter of African American, Pacific Islander and Hispanic/Latino students scored at proficient or above in math, compared with roughly 70 percent of Asian and White students.
- White San Franciscans 25 years and older are almost three times more likely to have a bachelor's or higher degree compared with African American and Pacific Islander residents.

**Figure 2: Poverty Among Racial/Ethnic Groups**




Source: San Francisco Health Improvement Partnership. "San Francisco Community Health Needs Assessment 2016." 2016. San Francisco Department of Public Health, Population Health Division. Accessed on July 18, 2018. https://www.sfdph.org/dph/hc/HCAgen/HCAgen2016/May%2017/2016CHNA-2.pdf.

## Health Disparities Among Racial/Ethnic Groups

- African American residents on average live 10 years less than White residents, 11 years less than Latino residents, and 14 years less than Asian/Pacific Islander residents.[27]
- Sixteen percent of live births for African American women in San Francisco were pre-term, more than twice the rate for Asian/Pacific Islander and White women (7.9 percent and 7.4 percent, respectively).[28]

**Table 1: Economic Indicators for San Francisco County by Race/Ethnicity**

| Indicator | African American | Pacific Islander | Hispanic/ Latino | Asian | White |
|---|---|---|---|---|---|
| Median household income [1] | $28,603 | $50,147 | $62,153 | $75,013 | $111,704 |
| Unemployment rate [1] | 16.1% | 15.2% | 7.3% | 6.5% | 4.8% |
| Children living below poverty level [1] | 47.3% | 35.7% | 14.4% | 11.2% | 3.0% |
| Families living below poverty level [1] | 24.3% | 29.1% | 10.6% | 8.7% | 2.2% |
| People living below poverty level [1] | 32.5% | 23.3% | 14.9% | 12.9% | 8.4% |
| People 25+ with a bachelor's degree or higher degree [1] | 25.0% | 26.7% | 31.5% | 43.3% | 74.0% |
| High school graduation rates [2] | 71% | 87% | 75% | 95% | 84% |
| % of students scored at proficient or above – Math [2] | 12% | 23% | 21% | 70% | 69% |
| % of students scored at proficient or above - English language arts [2] | 18% | 25% | 28% | 69% | 76% |

Sources [1] ACS 2016 5-Year Estimate, [2] SFUSD "Facts at a Glance 2017" [26]:

**Table 2: Health Disparities in San Francisco by Race/Ethnicity**

| Indicator | African American | Hispanic/ Latino | Asian/Pacific Islander | White |
|---|---|---|---|---|
| Percentage of pre-term births [1] | 16% | 9.7% | 7.9% | 7.4% |
| Infant mortality rate (per 1000 live births) [1] | 9.6 | 3.8 | 2.5 | 2.7 |
| Prostate cancer incidence rate [2] | 167 per 10,000 | 101 per 10,000 | 71 per 10,000 | 97 per 10,000 |
| Preventable emergency room visit [3] | 999 per 10,000 | 343 per 10,000 | 125 per 10,000 | 203 per 10,000 |
| Emergency room visits due to diabetes [3] | 80 per 10,000 | 25.6 per 10,000 | 8 per 10,000 | 10 per 10,000 |
| Emergency room visits due to heart failure [3] | 37 per 10,000 | 7 per 10,000 | 3 per 10,000 | 5 per 10,000 |
| Emergency room visits due to hypertension [3] | 57 per 10,000 | 20 per 10,000 | 11 per 10,000 | 10 per 10,000 |
| Emergency room visits due to bacterial pneumonia [3] | 59.4 | 22.3 | 10.1 | 17.4 |
| Emergency room visits due to adult asthma [3] | 156.7 | 32.5 | 10.4 | 18.9 |
| Life expectancy (years) [4] | 71 | 82 | 85 | 81 |

Source: [1] California Department of Public Health, Birth Statistiscal Master File, 2012, [2] National Cancer Institute, 2010-2014, [3] California Office of Statewide Health Planning and Development, 2013-2015, [4] California Department of Public Health, Deaths Statistical Master File, 2010-2013

- The rate of preventable emergency room visits for African American residents (999 per 10,000 adults) is almost three times higher than that of Hispanic/Latino residents, five times higher than that of White residents, and eight times higher than that of Asian/Pacific Islander residents.[29]
- African Americans experience a higher rate of hospitalization for diabetes, heart failure, hypertension, bacterial pneumonia and adult asthma higher than any other race/ethnic group.[30]

## Neighborhood Disparities in San Francisco

Research has shown that your zip code can matter more than your genetic code in determining health outcomes.[31] Comparing economic and health data in San Francisco by zip codes reveals the significant disparities that exist across (and increasingly within) San Francisco neighborhoods.

According to the 2018 "SocioNeeds Index" produced by the Conduent Healthy Communities Institute for the San Francisco Health Improvement Partnership (SFHIP), the nine San Francisco zip codes with the greatest socioeconomic needs correlated with poor health outcome are 94130 (Treasure Island), 94124 (Bayview–Hunters Point), 94108 (Chinatown), 94134 (Visitacion Valley, Portola), 94102 (Tenderloin, Hayes Valley, North of Market), 94133 (North Beach, Telegraph Hill, Chinatown), 94112 (Excelsior, Ocean View, Ingleside), 94132 (Lake Merced, Merced Manor, Lake Shore), and 94103 (South of Market).[32,33]

The high-need neighborhoods correspond with the city's areas of minority concentration.[34,35] White residents compose only 26 percent of the population in the nine high-need zip codes, whereas citywide Whites make up roughly 40 percent of the population.[36] The nine zip codes are home to many of the city's under-resourced racial/ethnic groups, including African Americans, Pacific Islanders and the Hispanic/Latino population.

**Table 3: Comparison of Economic and Health Indicators by Neighborhood**

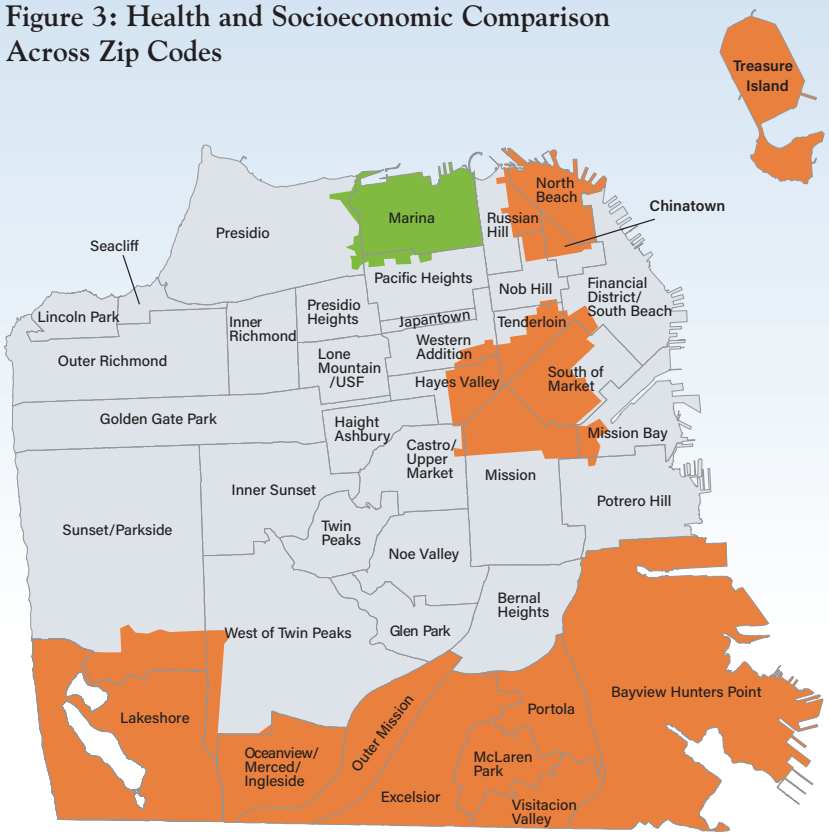
| | Bayview–Hunters Point (94124) | Chinatown (94108) | Visitacion Valley, Portola (94134) | Tenderloin, Hayes Valley, North of Market (94102) | Marina, Cow Hollow (94123) |
|---|---|---|---|---|---|
| **Economic Indicators [1]** | | | | | |
| Per capita income | $24,372 | $47,611 | $26,103 | $38,769 | $100,009 |
| Children living below poverty level | 32% | 26.90% | 16% | 16.40% | 7.60% |
| Families living below poverty level | 18.90% | 20.20% | 9.60% | 11.90% | 2.80% |
| People living below poverty level | 20.40% | 21.70% | 11.80% | 25.00% | 5.10% |
| Children living in single-parent households | 53.70% | 25.60% | 30.80% | 43.50% | 16.30% |
| People 25+ with a bachelor's degree or higher degree | 24.30% | 43.80% | 24.40% | 42.80% | 82.50% |
| Renters spending 30% or more of household income on rent | 57.70% | 48.60% | 56.30% | 54.10% | 27.00% |
| Households with cash public assistance income | 5.30% | 3.00% | 3.90% | 4.70% | 0.20% |
| **Health Indicators [2]** | | | | | |
| Preventable emergency room visits (per 10,000) | 616 | 150.6 | 297.6 | 570.8 | 134 |
| Emergency room visits due to diabetes (per 10,000) | 41.8 | 8.4 | 19.5 | 39.8 | 5.1 |
| Emergency room visits due to heart failure (per 10,000) | 20.4 | 2.7 | 7.5 | 20.3 | 3 |
| Emergency room visits due to hypertension (per 10,000) | 40.7 | 7.3 | 13.7 | 27.8 | 6.9 |
| Emergency room visits due to bacterial pneumonia (per 10,000) | 40.7 | 11.4 | 20.4 | 40.9 | 8.6 |
| Emergency room visits due to adult asthma (per 10,000) | 80 | 10.7 | 29.2 | 82.4 | 13.6 |

Source: [1] American Community Survey 2012-2016, [2] California Office of Statewide Health Planning and Development 2013-2015

- Approximately half of the city's African American population live in the nine high-need zip codes (25,000 residents).
- More than half of the city's Pacific Islander population live in these zip codes (56 percent or 1,769 residents)
- Forty-three percent of the city's Hispanic/Latino residents live in these zip codes (62,252 residents).
- Additionally, 36 percent of the city's youth population and 40 percent of the city's transitional-age youth (15 to 24 years old) live in the nine zip codes.

Comparing San Francisco's most under-resourced neighborhoods (including Bayview–Hunters Point, Visitacion Valley, Chinatown, and Tenderloin) with one of the city's most prosperous neighborhoods, the Marina (zip code 94123), reveal the stark disparities that exist across the city.[37]

## Figure 3: Health and Socioeconomic Comparison Across Zip Codes




**9 San Francisco zip codes with the greatest socioeconomic needs**

correlated with poor health outcomes

| Zip code | Neighborhood(s) |
|---|---|
| 94130 | Treasure Island |
| 94124 | Bayview–Hunters Point |
| 94108 | Chinatown |
| 94134 | Visitacion Valley, Portola |
| 94102 | Tenderloin, Hayes Valley, North of Market |
| 94133 | North Beach, Telegraph Hill, Chinatown |
| 94112 | Excelsior, Ocean View, Ingleside |
| 94132 | Lake Merced, Merced Manor, Lake Shore |
| 94103 | South of Market |

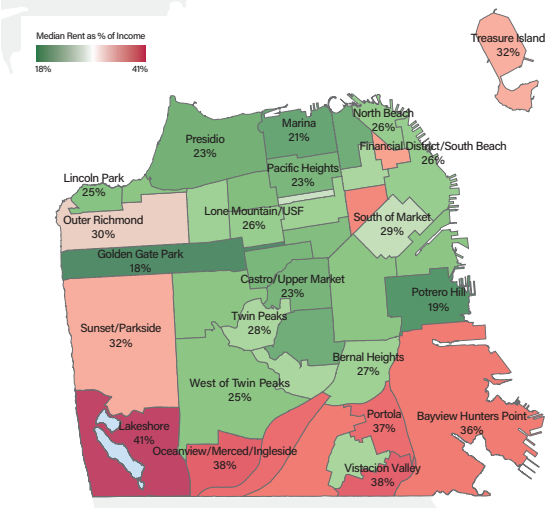
**Bayview–Hunters Point** / **Tenderloin** — COMPARED WITH — **THE MARINA**

- Per capita income in Bayview–Hunters Point is $24,372, which is a quarter of the per capita income in the Marina.
- Almost one-third of children in Bayview–Hunters Point live below the poverty level, more than four times that of the Marina.
- One-fifth of families in Chinatown live below the poverty level, more than seven times than in the Marina.
- The rate of preventable emergency room visits for Bayview–Hunters Point and the Tenderloin is more than four times that of the Marina.
- The rate of ER visits due to diabetes in Bayview–Hunters Point is more than eight times that of Marina.
- The rate of ER visits due to bacterial pneumonia in the Tenderloin is almost five times that of the Marina.
- The rate of ER visits due to adult asthma in the Tenderloin is more than six times that of the Marina.

Additional comparison statistics included:

- Per capita income in Bayview–Hunters Point is $24,372, which is a quarter of the per capita income of the Marina.
- More than half (53.7 percent) of children in Bayview–Hunters Point live in single-parent households, compared to 16.3 percent of children in the Marina.
- More than 75 percent of adults 25 years and older in Bayview–Hunters Point and Visitacion Valley/Portola do not have a bachelor's degree or higher degree, which is more than four times the proportion in the Marina.

**Figure 4: Median Rent as a Percentage of Gross Income**




Median Rent as a Percentage of Gross Income
Greater than 30% is considered "rent burden."

## Housing

Economic and health disparities have been a persistent problem in San Francisco. However, in recent decades, economic and social pressures have intensified to a degree that severely limits the city's ability to meet the needs of its most under-resourced communities and now threatens these communities with displacement and extinction.

San Francisco is currently considered the least affordable major city in the United States. [38] The city's housing crisis is threatening its ability to meet the needs of its middle-class, working-class and poorest, most under-resourced residents. Since 1970, median rent in San Francisco has increased 84 percent, adjusting for inflation, a rate that has outpaced median income growth for more than 60 percent of San Francisco households and more than doubled the income growth rate for the poorest San Franciscans.[39] In 2017 the median rent in San Francisco was $3,333/month for a one-bedroom apartment.[40] Half of all households in San Francisco earn less than the 2017 area median income (AMI) of $115,300, and 93 percent of renters in this category are severely cost burdened (paying more than 50 percent of their income on rent), putting them at risk for foreclosure, eviction or homelessness, and limiting their spending on other essential resources, including food, heating, transportation, childcare and health care. [41,42] As a result home ownership is essentially unattainable for all but the wealthiest residents, with the median home price rising to an all-time record of more than $1.6 million in 2018.[43]

San Francisco's high cost of living has resulted in fundamental changes in many San Francisco neighborhoods, among them significant displacement and high rates of homelessness. In 2015, more people moved from San Francisco to each of its closest surrounding counties than moved in the other direction, and the median income of those exiting the city was significantly lower than that of those who stayed in San Francisco.[44,45] Many residents who remain in the city have been forced to live in overcrowded conditions, with 45 percent of total San Francisco households living in overcrowded conditions.[46,47] In the worst cases, residents are completely homeless and forced to live in shelters and on the street. According to the 2017 San Francisco "homeless point in time" count and survey, of the 7,499 homeless people surveyed, 69 percent listed their previous residence as being in San Francisco County, and 55 percent had lived in San Francisco County for more than 10 years.[48]

Many community leaders are predicting that over the next decade, San Francisco will no longer experience health disparities – not because of breakthrough innovations that will eradicate inequities, but because of economic and social conditions that are driving its most vulnerable and under-resourced populations completely out of the city. UCSF's senior leadership has acknowledged the urgency of the current situation relating to health inequities, gentrification and displacement in San Francisco, and is fully committed to addressing these challenges.

### The African American Diaspora from San Francisco

San Francisco's African American population has decreased more than any other racial or ethnic group in the city.

- At its peak in 1970, the city's African American population was around 88,000, about 12 percent of the city's total population. By 2017, the African American population had been reduced to half that number, to roughly 48,000 persons, or about 6 percent of the total population.[49] This number is projected to decline even further, to 32,300 persons by 2050.[50]
- In 1990, there were nearly 30,500 African American households in San Francisco (10 percent of all San Francisco households). However, from 1990 to 2005, the number of African American households in San Francisco declined by 28.7 percent, down to 21,725 households in San Francisco.
- Since 1990, the African American population has seen a significant decrease in the number of middle and upper-income households, with the percentage of very low-income households increasing from more than one-half of African American households in 1990 to more than two-thirds in 2005.[51]
- Between 1997 to 2002 African American owned businesses declined by nearly one quarter and African American business receipts fell by 60.7 percent.[52]

# *The Power of Anchor Institutions*

For the past 30 years, large place-based, mission-driven institutions, such as hospitals and universities, have increasingly recognized the importance of the social determinants of health in determining community health and well-being.[53] Accordingly, many of these "anchor institutions," as they are often called, have committed to applying their long-term, place-based economic power alongside human and intellectual resources, to better the long-term health, economic, cultural and social fabric of their communities.[54] As a group, anchor institution initiatives tend to focus on three strategies: (1) workforce development, (2) procurement and (3) community investment.

These strategies are defined here and are described in more detail later in the report.

**WORKFORCE DEVELOPMENT** refers to the creation, implementation and coordination of public, private and non-profit sector policies, initiatives and programs designed to provide

individuals from under-resourced communities with opportunities for workforce readiness, job training, employment and career advancement. Effective workforce development strategies help sectors, businesses and organizations nurture and maintain a qualified and stable workforce.

A well-articulated, carefully implemented workforce development strategy can help an anchor institution to improve community well-being through the creation of a workforce development pipeline that moves members of under-resourced communities into well-paying jobs within the institution and its sectors. Through local and inclusive training, hiring and occupational advancement, and in partnership with local communities, health systems can invest in strategies that provide under-resourced residents with family-supporting jobs and career pathways, while simultaneously helping the institution to fulfill its hiring needs, achieve its health care mission, and promote health equity.

**PROCUREMENT** is the process of acquiring (procuring) all of the goods, services and work that are vital to an organization. The procurement process involves identifying needs, strategically vetting and selecting vendors, negotiating contracts and payment terms, and purchasing goods, services and work.

An "anchor" procurement strategy allows an anchor institution to align its purchasing of goods and services with its mission of advancing health and health equity, in order to address the social determinants of health. This strategy requires the institution to shift its procurement activities, as possible, in order to support diverse, local businesses that are owned by or employ under-resourced populations. Contracting with local businesses can create multiplier effects that can increase local economic activities and employment opportunities well beyond the initial purchase, helping to build local wealth and opportunity in under-resourced communities, while simultaneously filling the institution's supply chain needs.

**COMMUNITY INVESTMENT** is the process of investing financial resources with three defining elements: (1) a focus on under-resourced areas and/or communities that conventional market activity does not reach (in practice, low-income neighborhoods or regions, communities of color, and underserved geographic regions such as rural communities); (2) a focus on enabling the delivery of explicit social benefits (e.g., economic development, affordable housing, community health improvement, provision of needed goods and services at affordable rates, etc.); and (3) a financial product available for investment that can be managed in terms of risk and return (including social and environmental returns).[55]

Community investment allows an anchor institution to direct a portion of its investable assets locally, in order to address structural resource gaps that negatively impact the social determinants of health in under-resourced communities. The community benefits created by these investments will vary depending upon geographical scope, community needs and type of asset investment.[56] Investments can also generate a positive financial return to the institution, though ultimately the goal of community investment is to improve the lives of people and the health and resiliency of places that are currently underserved by conventional financial market activity. In "Investing in What Works for America's Communities: Essays on People, Place, & Purpose, the authors describe how it is critical for investors to broaden their outlook from a primary focus on investment in real estate… to encompass what goes on in those places: quality of services, physical and social structure of the community (including issues of transportation and public safety); and the well-being of people who live in these communities.[57]

The potential economic impact that UCSF can have if it employs these three strategies is huge. Hospitals and universities employ 8 percent of the U.S. labor force and account for more than 7 percent of U.S. gross domestic product.[58] Nationwide, approximately 5,000 hospitals employ roughly 5.6 million workers, spend more than $780 billion annually, and have endowments with an approximate value of $500 billion.[59, 60] Nationwide, universities employ more than three million people, generate more than $500 billion in total spending annually, and have endowment resources in excess of $400 billion.[61] Nonprofit hospitals and universities are a significant component of the U.S. urban labor market; in 2010 they accounted for 35 percent of the workforce employed by the top 10 private sector employees in the 20 largest U.S. cities.[62]

# *Harnessing UCSF's Institutional Power: Workforce Development, Procurement and Community Investment*

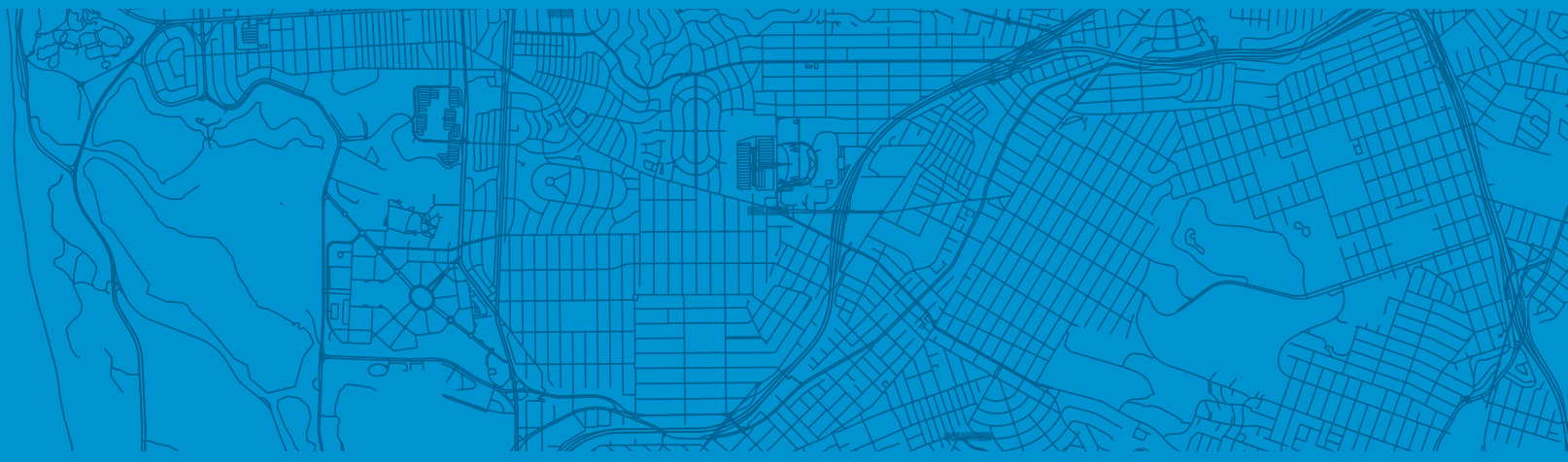
UCSF is in a unique position to address the social determinants of health in San Francisco's under-resourced communities and move the needle on advancing health equity in the city.

- UCSF focuses on health sciences across all of its branches and departments, and has a vested interest in the health outcomes of individuals in the community.
- UCSF is the second largest employer in San Francisco, with more than 24,000 employees, second only to the City and County of San Francisco, which employs nearly 28,000 people.[63]
- UCSF wields substantial financial resources. In 2016–17, UCSF had a total combined revenue of $6.4 billion and an endowment of more than $2 billion.[64,65]
- In 2016-17, UCSF spent more than $1.1 billion on goods and services ($730 million on supplies and materials, and $443 million on professional and purchased services).[66]
- UCSF's recently completed state-of-the-art hospital facility in the Mission Bay neighborhood is in close proximity to one of the areas with the highest concentration of poverty and health disparities in San Francisco.
- UCSF can strategically link its anchor mission to community and economic development by engaging communities and community organizations as partners to promote health equity and shape strategic anchor institution initiatives.
- UCSF can collaborate with other anchor institutions in San Francisco to maximize the collective impact on the social determinants of health and minimize duplication and fragmentation of efforts.

Harnessing and aligning UCSF's institutional power through these three anchor institution strategies of workforce development, procurement and community investment to advance the goal of promoting health equity can lead to significant improvements in the health outcomes of San Francisco's under-resourced populations. In doing so, UCSF can serve as a model for how academic medical centers and health sciences institutions across the nation can play a greater role in their communities, as well as a catalyst for addressing the social determinants of health that impact health disparities and outcomes in San Francisco.

SECTION II

# WORKFORCE DEVELOPMENT



# *Introduction*

Addressing high rates of unemployment and underemployment in under-resourced communities is critical, because in addition to its psychological impacts, employment impacts income, which is one of the most significant social determinants of health. Employment and income are essential to individuals accessing health-promoting goods, services and opportunities.[67]

Higher income is linked to better health. Individuals at the bottom of the economic ladder experience the worst health outcomes.[68] The health impacts of low income span the lifetime and affect health beginning at pregnancy and birth, with rates of low birth weight highest among infants born to low-income mothers.[69] Children in low-income families are about seven times more likely to be in poor or fair health than children in families with higher incomes.[70] Children from low-income families experience higher rates of asthma, heart conditions, hearing problems, digestive disorders, obesity, dental caries and elevated blood lead levels.[71] Adults with lower incomes are more likely to report experiencing health-damaging trauma, chronic stress and other psychosocial effects that result from neighborhood violence or disorder, residential overcrowding, financial hardship and more.[72] Workforce development is a critical strategy to alleviate San Francisco's skyrocketing levels of income inequality, which directly impacts health disparity.

Workforce development can also provide significant benefits to the institution, by helping the institution (1) address workforce hiring needs; (2) raise employee morale and motivation; (3) improve employee performance; and (4) achieve its institution mission.[73] Research has consistently shown that these benefits of a workforce development program can provide a positive return on investment. Workforce development programs provide both a financial ROI (e.g., cost savings from reduced turnover, reduced agency use and reduced overtime), as well as a social ROI (e.g., increases in employee motivation, performance and commitment as a result of employee engagement).[74] Examples of the benefits experienced at other health care anchor institutions are highlighted here:[75]

- The University of Maryland Medical Center, which provides an internal career advancement program in partnership with the Baltimore Alliance for Career in Healthcare (BACH), noted that 78 percent of participants in the program have been retained in employment since 2007, versus 58 percent of traditional hires.
- UPMC Hamot in Pennsylvania implemented a program to recruit, hire and train low-income residents as patient care assistants, which resulted in a 15 percent reduction in turnover for that occupation. This reduction translates to a conservative estimate of $10,000 in savings for the institution, per student.
- Norton Healthcare in Kentucky has a program called "Norton Scholars" offering up to $6,000 per year in tuition forgiveness, which led to lower turnover for program participants (5 percent

turnover compared with 31 percent for non-participants). Comparing nurses (RNs) trained through the program with non-scholar RNs over a four-year period, it is estimated that there were 61 fewer terminations than there would have been without the program, a savings of more than $5 million to the hospital.

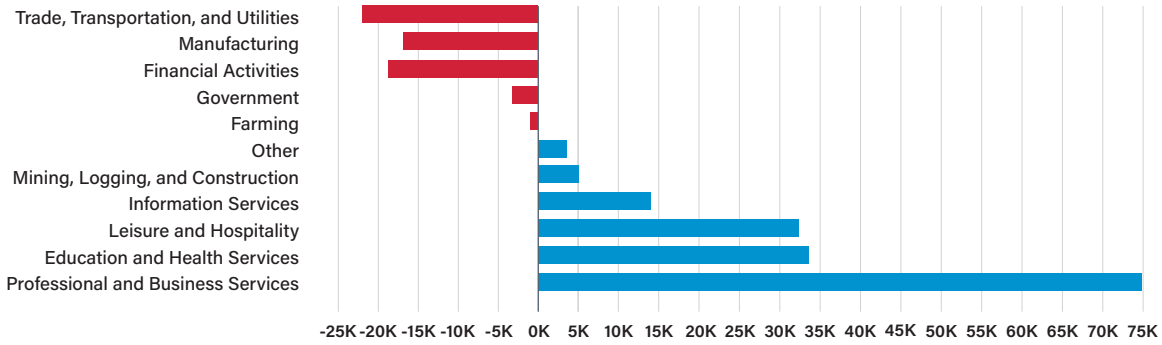
- The Greater Cincinnati Workforce Network conducted an analysis of costs and benefits for employers participating in its Health Careers Collaborative program (HCC) – which helps frontline employees attain associate's degrees and certificates in health occupations – and found that employers were earning $1.12 for every dollar invested in the program. The program also provided a social return that was not calculable in dollar terms, including increasing staff diversity, internal advancement opportunities and staff morale.

# *San Francisco's Changing Labor Market*

In recent decades San Francisco's labor market underwent a fundamental shift, with job growth increasing at the top and bottom of the wage scale, and the middle section of the wage scale shrinking.[76] While the technology sector in San Francisco has created many new high-paying jobs, more than half of new jobs in San Francisco are expected to be low-wage service sector jobs with earnings less than $54,000/year, which is below the city's 2018 Self-Sufficiency Standard for a single adult ($55,861).[77,78]

Since 1990, the city's traditional blue-collar job sector has experienced the sharpest decline, with the manufacturing, trade, transportation and utilities sectors experiencing a combined job loss of more than 40,000 jobs (Figure 5).[79] New positions, generated in education and health services as well as professional and business services, require entirely different skill sets and more advanced education, making it very difficult for workers to move from one sector to another.

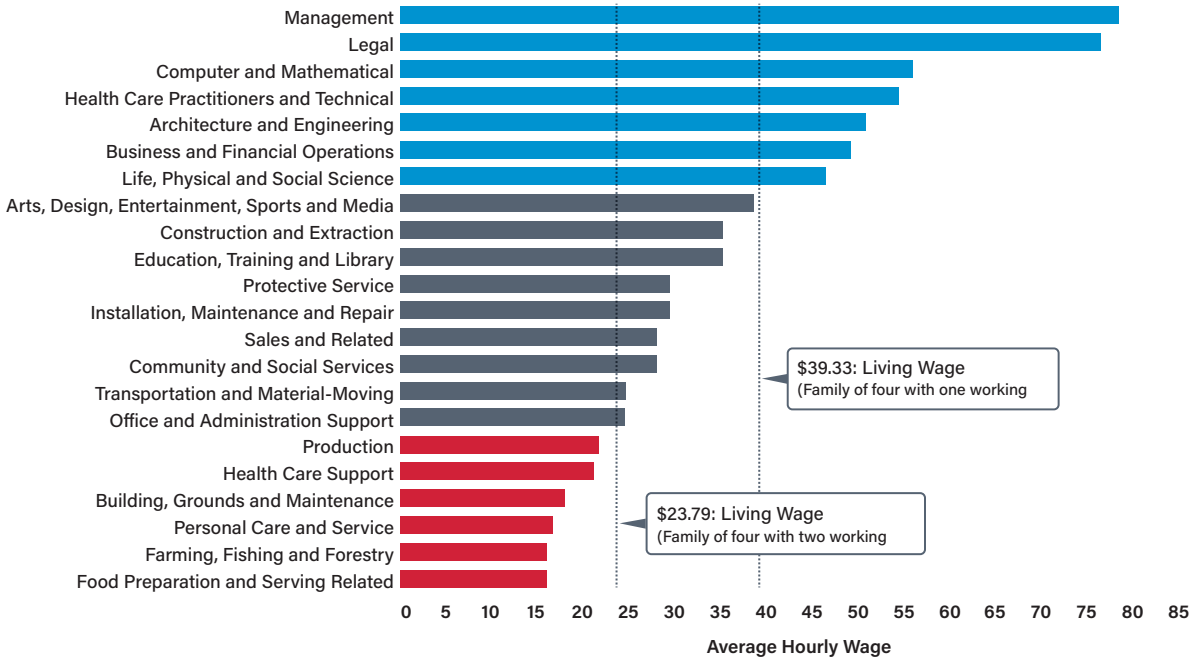
**Figure 5: Change in Number of Jobs from 1990 to 2015 in San Francisco by Sector**




Obtained from the California Employment Development Department.

Despite all of the job growth in San Francisco, in far too many sectors employees are paid less than the amount necessary to adequately provide for themselves and their families. As illustrated in Figure 6, a majority of occupational sectors in San Francisco pay less than a living wage for a family of four with one working parent ($39.33/hr), and several do not pay enough for a family of four with two working parents ($23.79/hr). The number of San Francisco residents struggling to make ends meet while earning less than a living wage is high. Almost one in three of the city's residents are living below 200 percent of the federal poverty level ($48,500 for a family of four).[80]

**Figure 6: Average Hourly Wage in San Francisco Metropolitan Division by Sector**




Statistics compiled by the California Employment Development Department, in cooperation with the Bureau of Labor Statistics. The two living wage calculations represent the living hourly wage for a family of four with one working parent and a family of four with two working parents. Both estimates are provided by the Massachusetts Institute of Technology's Living Wage Calculator.

San Francisco's unemployment rate, which currently stands at 2.1 percent, is an indicator of the city's strong labor market.[81] However, while the labor market in San Francisco is strong for well-educated San Franciscans and non-San Francisco residents who travel into the city to work in high-paying jobs, these jobs are not spread evenly across the city's residents or its neighborhoods. In addition to the many San Francisco residents to work in low-wage service sector jobs, many San Francisco residents are left out of the workforce altogether as a result of disparities in education attainment, access to social networks, criminal records, mental health needs, disability and other factors.

Almost all of the jobs in high-paying sectors of the labor market require advanced degrees, technical expertise or both excluding those who have not been served well by the education system or are unable to afford such training. Unemployment rates are more than 2.5 times higher for those with less than a high school education as opposed to a bachelor's degree or higher degree.[82] Meanwhile, only about a quarter of African American adults and a third of Hispanic/Latino adults have a bachelor's degree, compared with nearly three-quarters of the White adult population.[83] A 2017 Brookings Institute analysis of the working-age population in the 130 largest cities and counties in the country, showed that San Francisco has the second lowest African American employment rate among the jurisdictions (53 percent, second only to Detroit), as well as one of the highest White employment rates (84 percent).[84] In addition, the unemployment rate for African Americans was 12.1 percent, almost four times the White unemployment rate (3.2 percent).[85]

Differences in education attainment and employment are even greater for the most under-resourced populations in San Francisco. A 2017 household survey of the Potrero Terrace and Annex (PTA) public housing site, located roughly one mile from UCSF Mission Bay, revealed:[86]

- Of survey respondents, 66.4 percent stated that the highest level of school completed by themselves or a household member was high school or lower.
- Of the 721 PTA adult residents surveyed with employment information, almost half (48 percent) of adults were unemployed.
- Among unemployed adults, close to 60 percent were looking for work, and three in four were eager to change their employment status.
- Of unemployed respondents, 41.5 percent indicated that they are out of work because of a disability.
- Of the 42 percent who were employed, 61 percent were working in the low-wage service industry.[87]

Racial disparities in education and opportunity are urgent issues that need to be addressed, particularly as the city's labor force becomes increasingly diverse. In San Francisco, more than half of millennials (defined as those aged 18 to 35 in 2015) are from racial and ethnic minority groups. In this report, the term "minority groups" refers to African Americans, Asian Americans, Native Hawaiians/Pacific Islanders, Hispanics/Latinos and American Indians/Alaska Natives.[88] And the post-millennial generation will be even more racially and ethnically diverse, with two-thirds of the population belonging to racial and ethnic minority groups. If current disparities continue at the same rate, large numbers of people from minority populations entering San Francisco's labor market will not have equal access to the city's prosperity, which will widen existing economic and health disparities even further. [89] To reduce these impacts, anchor institutions must accelerate workforce development efforts for under-resourced minority populations, in order to equip these populations with the skills and networks necessary to compete for opportunities in the city.

### Why Hiring Locally Can Benefit UCSF

A report written for the "Hospitals Aligned for Healthy Communities" Toolkit Series outlined the advantages of medical institutions hiring locally. They include:

**Short-term Impacts:**

› Reduce job turnover rates
› Increase recruitment process efficiency
› Save internal training and orientation costs
› Create a more diverse workforce
› Develop partners that can uniquely adapt to your business needs
› Leverage public resources by linking existing workforce development dollars to employment demand

**Long-term impacts:**

› Improve employee morale through internal investment and strong community connections
› Address issues of health equity and identified community health needs
› Improve your reputation in the community
› Reduce the carbon footprint by increasing the number of employees living close to work
› Increase community impact by targeting underserved neighborhoods

Source: Zuckerman, David and Parker, Katie. "Inclusive, Local Hiring: Building the Pipeline to a Healthy Community." The Hospitals Aligned for Healthy Communities Toolkit Series. 2016. Accessed July 18, 2018. http://hospitaltoolkits.org/workforce/.

# *UCSF's Workforce Landscape*

As the second largest employer in San Francisco, and the largest employer in San Francisco's sizable and growing health care sector, UCSF can use targeted workforce development strategies to directly address the social determinants of health and improve quality of life for the city's low-income residents. UCSF can achieve this outcome by creating pipelines that move under-resourced populations into stable jobs and career pathways within the institution. Through local and inclusive training, hiring

and career advancement, and in partnership with government agencies and community organizations, UCSF can lift up under-resourced residents and address disparities in income and opportunity, while simultaneously meeting the institution's hiring needs and achieving its mission to advance health equity.[90]

UCSF's workforce is divided into two distinct parts: UCSF campus and UCSF Health. The following section analyzes each branch separately but makes recommendations for the institution as a whole when applicable.

## UCSF Campus[91]

- UCSF campus employs 20,761 people, of whom 43 percent are employed in staff positions. Of staff positions, the vast majority (83 percent) are non-managerial.
- The data for campus employee distribution by bargaining unit is limited, as more than half are unclassified. However, the data that is available reveals that there are a significant number of entry-level research support, clerical and service positions. UCSF employees are organized by bargaining units. Each bargaining unit represents a separate contract with a union that represents all employees covered under that unit (Table 4).
- More than half (60 percent) of campus employees earn between $50,000 and $100,000. Thirteen percent of employees earn less than $50,000. Twenty-five percent earn between $100,000 and $200,000. Two percent earn more than $200,000 (Figure 7).
- The racial and ethnic composition of UCSF campus is diverse and comparable to that of the overall population of San Francisco, except for Hispanics being greatly underrepresented proportional to their presence in the San Francisco population. Hispanics make up roughly 15 percent of the overall population of San Francisco, but less than 8 percent of the UCSF campus workforce.[92]
- There are major disparities across salary bands and management level within the UCSF campus workforce. The proportion of White employees increases at higher salary and management levels, while the proportion of non-White employees increases at lower salary and management levels (Figure 8).
- Fewer than half (47 percent) of campus employees live in San Francisco. The largest number of employees who are San Francisco residents live in zip code 94122, which includes portions of the Outer Sunset and Sunset/Parkside neighborhoods.

**Table 4: Campus Staff Distribution by Bargaining Unit/Personnel Program**

| Unit/ Personnel | Number of Employees |
|---|---|
| Research Support Professionals | 1,238 |
| Clerical and Allied Services | 698 |
| Service | 568 |
| Health Care Tech | 370 |
| Health Care | 340 |
| Technical | 329 |
| Nurses | 172 |
| Police Officers | 38 |
| Skilled | 37 |
| Physicians, Dentists, Podiatrists | 5 |

**Figure 7: UCSF Campus Salary Distribution**

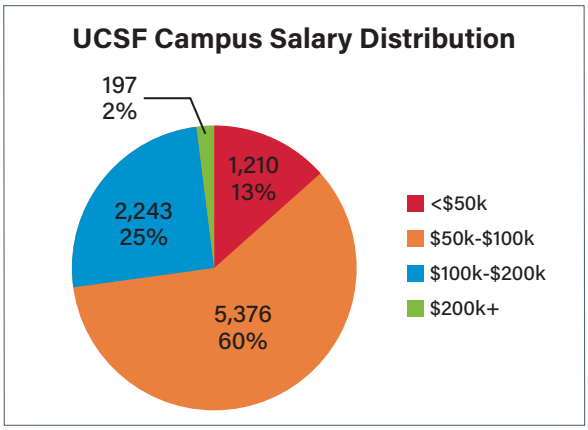
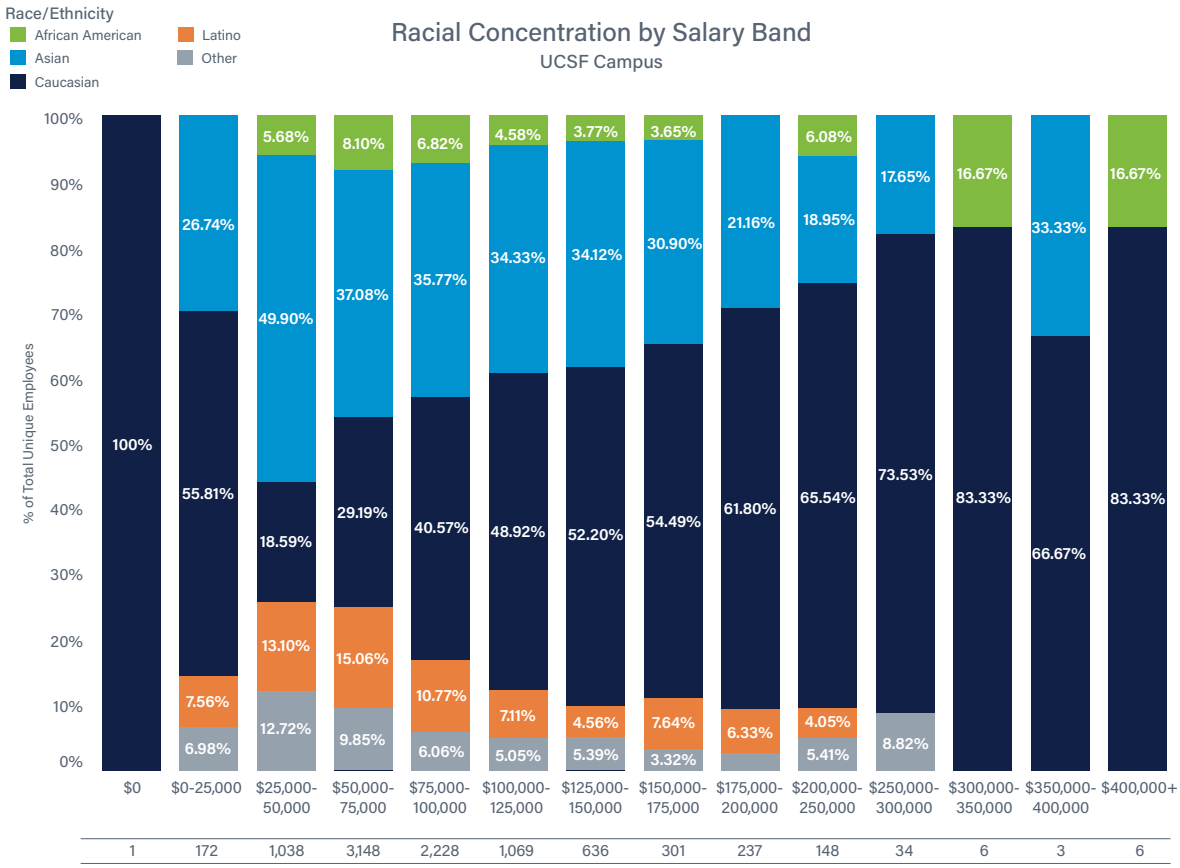


**Figure 8: UCSF Campus Racial Concentration by Salary Band**




- The overall turnover rate for non-academic personnel at UCSF campus is high at approximately 20 percent in fiscal year 2018. This rate is much higher than the national average turnover rate in higher education, which in 2015 was 12.8 percent.[93,94]

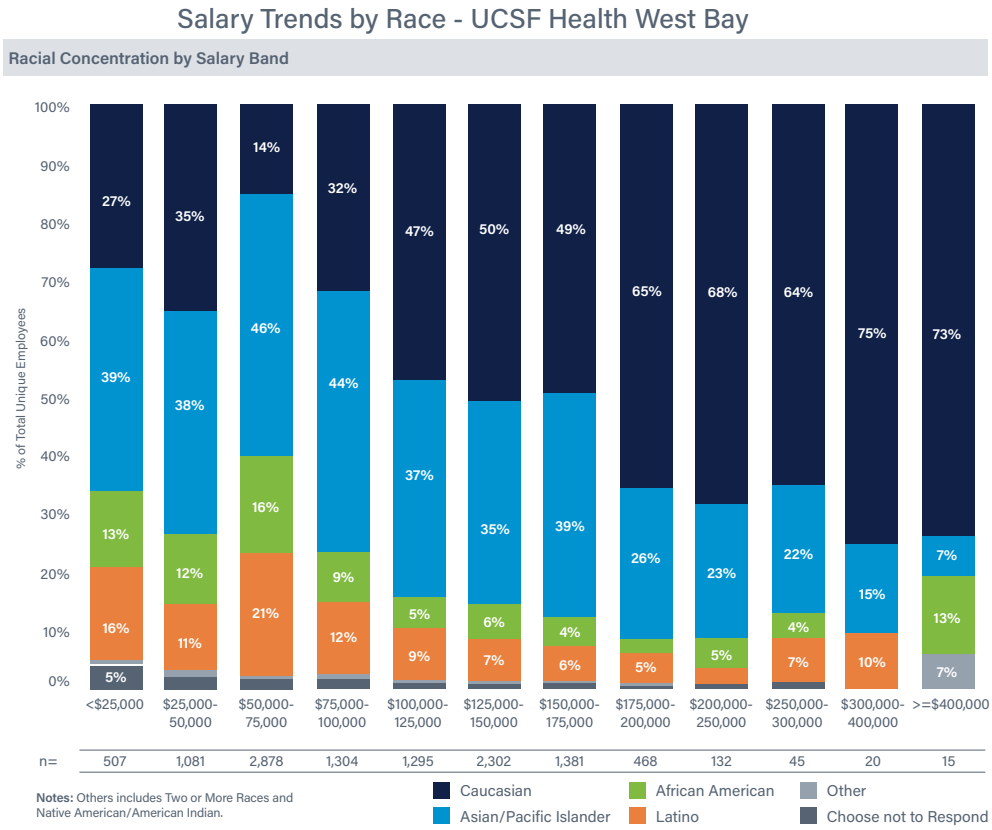
## UCSF Health

- UCSF Health employs 11,160 people. Ninety-two percent of employees are frontline staff. More than half of employees are nurses and patient care technicians, who make up 32 percent and 25 percent of employees, respectively (Table 5).
- Almost half (46 percent) of UCSF Health employees earn a salary between $100,000 and $200,000. Fourteen percent of employees earn less than $50,000. Thirty-eight percent earn between $50,000 and $100,000. And 2 percent

**Table 5: Composition of UCSF Medical Employees by Bargaining Unit and Personnel Program**

| Bargaining Unit/ Personnel Program | Number of Employees |
|---|---|
| Nurses | 3,612 |
| Patient Care Technician | 2,784 |
| Non-represented MSP (Management and Senior Professional) | 1,139 |
| Clerical | 1,108 |
| Non-represented PSS (Professional and Support Staff) | 995 |
| Health Professionals | 968 |
| Service | 491 |
| Skilled | 19 |
| Non-represented SMG (Senior Management Group) | 4 |

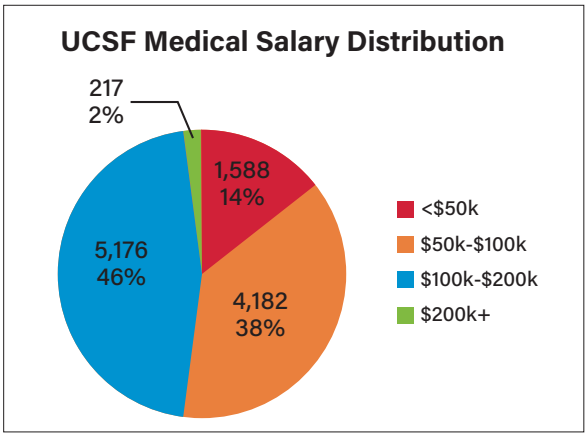
**Figure 9: UCSF Health Racial Concentration by Salary Band**




earn more than $200,000 (Figure 10).

- There are major disparities across salary bands and management level within the UCSF Health workforce (Figure 9). The proportion of White employees increases at higher salary and management levels, while the proportion of non-White employees increases at lower salary and management levels.
- The average turnover rate at UCSF Health is relatively low at 9 percent across all race/ethnicity categories in FY 2017, which is equal to the average turnover rate for Northern California health care facilities (9.1 percent) and less than the statewide average (10.3 percent).[95]

**Figure 10: UCSF Health Salary Trends**




- In 2017, the involuntary turnover rate for African American and Latino staff was higher than for any other racial or ethnic group. The rate of involuntary turnover for African Americans was more than twice that of the involuntary turnover rate of White and Asian/Pacific Islander staff.

Due to data limitations, we were unable to analyze data on job openings and attrition, types of entry-level positions, and other employment-related data for for either the campus or UCSF Health. If

this data can be made available, it would be very valuable for UCSF leaders to better understand employment challenges and opportunities.

While an initial snapshot of the demographic profile of the UCSF campus and Health workforce may not seem particularly eye-opening, a deeper look shows disparities that exist in job opportunities and growth. These differences are emblematic of a much wider, systemic issue, with opportunity gaps related to employment access and unequal opportunities in San Francisco. In the following section we describe UCSF's current education and workforce initiatives and make recommendations for how workforce pathways can be improved.

# *SWOT Analysis of UCSF's Workforce Development Strategy*

Interviews with UCSF staff and community stakeholders, combined with research on UCSF's workforce programs, yielded the following Strengths, Weaknesses, Opportunities and Threats (SWOT) for UCSF's workforce development strategy.

## STRENGTHS

**UCSF Institutional leadership support and strong mission statement**

- UCSF has strong existing commitments to the goal of advancing health equity.
- In 2016, UCSF adopted the institution-wide PRIDE Values, which stands for Professionalism, Respect, Integrity, Diversity and Excellence.[96] This unifying set of beliefs helps set expectations, drive decision-making and build a supportive workplace culture that inspires actions.[97]
- UCSF's "Principles of Community," embraced as part of UC-wide core beliefs, includes several principles that align well with anchor institution strategies. The first principle states: "We recognize, value, and affirm that our rich diversity contributes to the excellence of the University and enhances the quality of campus life for individuals and group." The fifth principle states: "We will form a campus infrastructure that is responsive to the needs of our community. We have empathy for others, and will establish systems which address the needs of the one and the many."[98]

**The scale of the UCSF workforce and breadth of entry-level opportunities**

- Due to its size and scope, UCSF has an abundance of entry-level positions throughout the institution. Many of these positions do not require a four-year degree and can provide meaningful opportunities for local, under-resourced residents. It is estimated that 6 to 7 percent of UCSF jobs are unfilled at any time.[99] This estimate, coupled with the high average turnover rate for UCSF campus (roughly 20 percent), suggests that there are openings that workforce development pipeline programs can help to fill.

**Figure 11: SWOT Analysis of UCSF's Workforce Development Strategy**

| STRENGTHS | WEAKNESSES | OPPORTUNITIES | THREATS |
|---|---|---|---|
| › UCSF's institutional leadership support and strong mission statement | › Insufficient funding and capacity within UCSF programs | › UCSF's workforce development opportunities | › Rapid rate of displacement and neighborhood change in San Francisco |
| › The scale of the UCSF workforce and breadth of entry-level opportunities | › Inadequate data infrastructure and lack of analysis/ evaluation capacity | › Willingness and initiative to collect and analyze job vacancy and attrition data | › Limited capacity of neighborhood-based nonprofits working in workforce development |
| › A robust Office of Diversity and Outreach | › Some current employees experiencing a hostile work environment | › Existing partnerships with community organizations and other health care institutions | › Difficulties with workforce development programs reaching populations facing the greatest barriers to employment |
| › Large number of existing programs within UCSF for local training and hiring, internal career development, education pathways and outreach | › Siloed nature of UCSF's programs | › City of San Francisco Workforce Alignment Initiative, Racial Equity and Trauma Initiatives | › Individuals and families losing social benefits due to changes in income and employment |
| | | › Existing workforce development collaborations for under-resourced populations in San Francisco | |
| | | › Potential influence of UCSF on the San Francisco workforce development landscape | |

**A robust Office of Diversity and Outreach**

- UCSF has a robust infrastructure of programs designed to foster a supportive workplace environment while advancing diversity, equity and inclusion throughout the campus community and among senior leadership.
- Most of these diversity programs are provided through the well-established UCSF Office of Diversity and Outreach (ODO). According to ODO's Annual Report, in 2016–2017, the office's internal education and training programs, which focused on diversity, inclusion and sexual violence harassment and prevention, reached more than 25,532 participants.[100]

**Large number of existing programs for local training and hiring, internal career development, education pathways and outreach within UCSF**

- UCSF has four major training and hiring programs for San Francisco residents, three of which are specifically designed to support under-resourced populations:[101]
    - » The EXCEL program is a partnership among UCSF, the City and County of San Francisco and Jewish Vocational Services to provide a six-month, paid program to train San Francisco CALWorks recipients for administrative positions within UCSF and other health sector employers.[102]

  - The Citywide Employment Program, located within the Citywide Case Management division of UCSF's Department of Psychiatry helps San Francisco residents with behavioral health needs, a criminal justice history or both to attain competitive employment, by providing case management, vocational assessment and employment services.[103]
  - The partnership between UCSF and Toolworks, a nonprofit organization based in San Francisco that provides on- and off-site workforce training, employment services and case management for individuals with disabilities. Many Toolworks trainees are employed in the Medical Center Nutrition and Food Services department; the program partners with other departments as well.[104]
  - The Community Construction Outreach Program (CCOP) sets and implements voluntary local hiring goals to ensure that qualified San Francisco residents have opportunities for employment on UCSF construction and renovation projects.
  - Bridge to Biosciences provides training and personal support to prepare students for certificates and degrees in the biosciences. Bridge students are typically adults from diverse backgrounds, including some without any college degree, who are training for a career as a laboratory assistant or laboratory technician. The program goals are to prepare students for their internship at UCSF and other Bay Area labs, prepare students for employment in academia or in industry, and support students to continue their science education to graduate with a biotechnology certificate or a two-year transfer to a four-year institution.

- UCSF has one program to support career advancement for frontline employees. The School At Work (SAW) program provides participating frontline employees with career planning and on-site foundational skills development through online coursework. Participants receive release time to attend the program (the employee's department is compensated by HR), which meets for two hours weekly, for about six months.[105]
- UCSF has more than 70 different education pathways programs across the institution. These programs target youth from kindergarten to college, and range in length from one-day exposure programs to long-term (more than one year) partnerships. The majority (26 programs) have a core focus on career awareness and community engagement. Twenty programs provide research internship opportunities; 12 programs have a primary focus on academic enhancement; three programs focus on youth mentorship; and three programs focus on health awareness education.
- UCSF currently participates in, or hosts, numerous employment outreach events targeting diverse populations. These include the Veteran's Open House; LGBTQ job fairs; job fairs to recruit persons with disabilities; networking mixers; presence at SF PRIDE; 2018 sponsorship Prospanica local chapter and involvement in its national conference and job fair to attract Hispanic professionals; and attendance at the African American MBA national and local chapter networking and job fair.[106]

## WEAKNESSES

**Insufficient funding and capacity within UCSF programs**

- While there are clear opportunities and demand from both internal and external partners to expand workforce development programs at UCSF, a lack of dedicated funding and staffing within UCSF workforce development programs is cited as the biggest internal barrier to expansion.

UCSF stakeholders who are pursuing, or are interested in pursuing, workforce development partnerships consistently state the need for dedicated workforce development staff, who can be responsible for identifying opportunities and needs, cultivating relationships with workers and managers, providing ongoing support to program participants, and adapting workforce activities to changing labor demands. These are the core elements of workforce development program success.[107]

**Inadequate data infrastructure and lack of analysis/evaluation capacity**

- Although UCSF's Human Resources department currently collects and tracks a lot of important data regarding UCSF employee salary, demographics, internal movement, turnover and other factors, the department does not have the capacity to analyze and evaluate this data sufficiently.
- At UCSF there is currently only one staff member designated to Human Resources data evaluation, primarily for UCSF Health.[108]
- While the data is sometimes analyzed by other departments (i.e., Office of Diversity), this is not done consistently.
- The lack of in-depth data evaluation, especially relating to key metrics (such as job turnover, job retention, job vacancy, recruitment costs, temporary agency usage, and qualitative data on UCSF workforce program participants and their experiences) creates a missed opportunity to improve hiring and workforce development efforts. An increase in workforce data analysis can help existing programs demonstrate their social and financial benefits to the institution, thereby building the "business case" for expansion. See Appendix IX for guidance on possible metrics to track workforce development program impact.
- The lack of exit interviews is a missed opportunity to identify and implement possible improvements.

**Some current employees experiencing a hostile work environment**

- UCSF and community stakeholders involved with UCSF's workforce development programs noted that they had verbal evidence regarding some individuals experiencing a hostile workplace environment created by department peers, supervisors or both.
- The 2014 UCSF campus climate report found that a higher percentage of ethnic and racial minorities reported experiencing exclusionary, intimidating, offensive or hostile conduct.[109]
- Underrepresented minority and multi-minority respondents were found to be less comfortable with the overall campus climate, workplace climate and classroom climate than the White and "other people of color" respondents.[110]
- The campus climate may be a contributing factor to the high rate of involuntary turnover among African Americans and Latinos at UCSF, which currently stands at 3.3 percent and 2.6 percent for these two groups, respectively. From 2015 to 2017, African Americans left UCSF involuntarily at higher rates than any other racial or ethnic group, and the 2017 involuntary turnover rate for African Americans was more than twice that of White and Asian employees. This is a very concerning trend given the high rate of displacement of African Americans from San Francisco. The Latino involuntary turnover rate has risen consistently in the past three years, a concerning trend given that Latinos are currently underrepresented in UCSF's workforce proportional to their presence in the city's overall population.

**Siloed nature of UCSF programs**

- UCSF's various workforce development and education pathways programs operate independently and, as such, have not developed common goals or metrics. In addition, many UCSF programs are isolated from citywide or neighborhood-level initiatives, which seek to accomplish the same goals. The result is duplication of effort and inefficient use of resources. Another result is that knowledge is not widely shared among departments and with the community, even though such sharing could unveil new opportunities and solutions.

## OPPORTUNITIES

**UCSF workforce development opportunities**

- Currently, participant populations in UCSF research tend to be relatively homogenous, and there is a need to diversify research participants to improve the quality and accuracy of the institution's research. Diversifying the research workforce is one potential strategy that has been shown to improve engagement with diverse research participants, while helping to ensure that research is culturally informed.[111] UCSF could consider expanding an existing workforce development program, or creating a new one, to help fill and train the clinical research coordinator and other related jobs within the institution. This entry-level position does not require a four-year degree, and has an established career trajectory and significant opportunities for advancement and growth.[112]
- UCSF stakeholders have mentioned that UCSF is having a hard time filling many entry-level positions across the institution. For example, Campus Life Services has a hard time hiring Class C shuttle drivers, childcare workers and swimming pool lifeguard positions.[113]
- UCSF's Laboratory Animal Resource Center (LARC) provides care for laboratory animals and acts as a resource center for faculty research with respect to the use of laboratory animals.[114] LARC employs 160 people, many of them in entry-level positions.[115] However, in recent years, LARC has found it increasingly difficult to fill its entry-level animal technician positions; the job's responsibilities include the everyday care, health monitoring and sanitation of the UCSF animal facilities, and the position does not require a four-year degree. LARC's director and the associate vice chancellor of Research have expressed interest in partnering with community workforce development organizations to help fill vacant positions.[116] One partner LARC is considering is the Delancey Street Foundation, a local nonprofit that provides residential self-help and workforce development services to individuals with substance abuse issues, ex-convicts, homeless and other populations with significant barriers to employment.[117] LARC may serve as a UCSF pilot for this association. LARC will discuss this idea with the following UCSF offices as appropriate: Legal Affairs, Risk Management and Insurance Services, and Police Department. LARC hopes to be one of many pursuing the same efforts within UCSF.
- There is an opportunity and demand to expand the EXCEL program into other positions, such as the Medical Assistant position, which does not require a four-year degree, and Clinical Research Coordinators (above).
- Career pathway opportunities stemming from entry-level positions at UCSF could include a range of professional positions – clinical lab scientists; health information management coders; physical, occupational, speech and respiratory therapist; specialty nursing and nurse practitioners; radiology techs – all of which require a bachelor's or master's degree.

**Initiative to Collect Job Vacancy and Forecasting Data[118]**

- It is estimated that 6 to 7 percent of UCSF jobs are unfilled at any time.[119] To better understand vacancies and trends, UCSF Medical currently conducts a point-in-time report that identifies exactly which vacancies are open at any given time. In addition, more recently the Medical Center's HR department has been collecting monthly snapshots of vacancies to identify trends in vacancies. However, identifying trends in vacancies has been complicated by operational practices that make it more convenient for managers and recruiters to keep a requisition for jobs "open" for long periods of time, clouding what the data might reveal about particular positions. The recruiting team has been working to alter some of these operational practices, which will eventually lead to cleaner data.
- Overall, HR is in the process of changing its structure to accommodate more strategic work to align with departments and business needs. Understanding trends in vacancies, attrition and job growth allows UCSF to better align existing workforce development programs with hiring needs. Better alignment can lead to improvements in the quality and relevancy of the training provided in these programs, as well as higher and more consistent placement rates. UCSF could consider allocating resources to replicate this work on the campus side, where the turnover rate is higher.

**Existing partnerships with community organizations and other health care institutions**

- UCSF can leverage existing partnerships with community organizations and other health care institutions to support anchor institution strategies across San Francisco. Building on existing partnerships can increase knowledge sharing between institutions, help to scale anchor institution strategies, and attract more external and internal funders.[120] One example of a well-established partnership is the San Francisco Health Improvement Partnership (SFHIP), which includes representatives from every health care institution in San Francisco, and of which UCSF is a founding partner through the Clinical and Translational Science Institute (CTSI).

**City of San Francisco Workforce Alignment, Racial Equity and Trauma Initiatives**

- The San Francisco Office of Economic and Workforce Development (SFOEWD) is leading the Citywide Workforce Alignment Initiative to align public workforce development program goals and resources. As a major public institution in San Francisco, UCSF can keep abreast of developments as a result of this initiative in order to maximize the use of resources and limit duplication of effort among public institutions.
- The San Francisco Human Rights Commission, in partnership with the Government Alliance for Racial Equity, is currently leading the city's Engineering for Equity initiative, which has two objectives: (1) advise city departments on how to eliminate disparities in public service, and (2) ensure community involvement in the full range of government decisions.[121] The department provides city departments with specific tools and strategies to utilize when making public policy decisions and expanding programs and resources. The department also helps city agencies create equity plans and provide regular racial equity trainings and events.[122]
- The Trauma Informed System Initiative of the San Francisco Department of Public Health (SFDPH) also provides a mandatory, foundational training on trauma for the entire SFDPH workforce, and provides trauma trainings to other city agencies as well.[123] UCSF could explore opportunities to partner with city agencies on internal trainings around racial equity and trauma for staff, students and faculty.

**Existing workforce development collaborations for under-resourced populations in San Francisco**

- There are already a wide range of workforce development programs and collaborations in San Francisco targeting the city's under-resourced populations. For example, a partial inventory of 80 community organizations serving San Francisco's under-resourced populations (i.e., immigrants, persons with disabilities, transitional age youth, homeless or at risk of homelessness, those experiencing re-entry, public housing residents, and more), revealed that 24 organizations provide sector-based training for jobs in the health care, hospitality, food service, information technology, early childhood education, custodial and construction fields (see Appendix VII).
- There are also many workforce development initiatives led by other large institutions, including but not limited to the San Francisco Public Utilities Commission, California Pacific Medical Center, and Kaiser Permanente in San Francisco (see "Promising Practices" section below).

**The potential influence of UCSF on San Francisco's workforce development landscape**

- Many large institutions like UCSF are already engaged in the city's workforce development landscape. For example, in 2013, when the California Pacific Medical Center (CPMC) sought city approvals to build a new hospital on Van Ness Avenue, the San Francisco Board of Supervisors approved CPMC's 10-year development agreement (DA), which outlined, among many other things, local hiring requirements for CPMC, and also required the institution to work with SFOEWD's First Source Hiring program. CPMC's senior project manager and compliance officer noted that when CPMC first partnered with SFOEWD, the First Source Hiring program was effectively in its infancy; since then, the program has expanded considerably, due in part to CPMC's involvement. As the program has expanded, CPMC has been able to regularly achieve its workforce hiring goals.
- Any workforce development partnership with UCSF, the city's second largest employer and the largest in San Francisco's health care sector, will undoubtedly require and result in the expansion of partner organizations.[124]
- UCSF is currently represented on San Francisco's Workforce Investment Board (WISF) by Jeffrey Chiu, vice president of Human Resources for UCSF Health, who currently serves as a board member. The board plays an integral role in overseeing and setting the direction for San Francisco's workforce system, establishing policies for workforce development in San Francisco and influencing the design and implementation of the delivery system. UCSF can leverage its influence to align the city's workforce strategies with the goal of advancing health equity citywide, and promote a workforce training delivery system that can serve the city's hardest-to-employ populations.

## THREATS

**Rate of displacement and neighborhood change**

- The rate of displacement due to the city's affordable housing crisis and neighborhood change in San Francisco is a significant challenge facing all workforce development initiatives.
- In addition to long-time low- and middle-income residents leaving San Francisco, many low-income neighborhoods are changing rapidly due to new development and the in-migration of newcomers, who tend to be more educated and have higher incomes. For example, San

Francisco's District 10, which includes the low-income southeastern neighborhoods, is expected to add 20,000 new households, and 38,000 new office, production, distribution, and repair (PDR), and retail jobs.[125] The population of the Dogpatch neighborhood adjacent to UCSF is expected to triple in the next few years.[126] On average, from 2005 to 2016, in-migrants to the city earned $12,640 a year more per household after arriving than out-migrants did before they left.[127] While this growth can create new opportunities for current low-income residents living nearby, it also leads to increases in the cost of living and the displacement of the under-resourced populations that the workforce development strategies are trying to reach.

**Limited capacity of neighborhood-based nonprofits active in workforce development**

- Nonprofits face significant challenges as a result of the city's rising costs, including lack of financial stability; high rates of staff turnover; time spent fundraising; limited investments into areas such as leadership, staff training and data collection and more. A 2016 survey of almost 500 Bay Area nonprofits found:[128]

    1. Four out of five nonprofits are concerned that the real estate market will hurt their financial sustainability.
    2. Two out of three nonprofits expect to make a decision about moving in the next five years – most of them in the next two years.
    3. More than a third of respondents have already moved at least once in the past five years, and two-thirds said cost was a reason for moving.

- Many nonprofit organizations are finding it difficult to provide competitive wages for workers at both the staff and leadership levels. For example, in the past year, of the 50 workforce development organizations OEWD funded, 15 lost direct-level leaders, reflecting a huge crisis that the city is currently having difficulties addressing.[129]
- Without additional resources, community organizations cannot engage in activities that could benefit their work, such as increasing collaboration among community-based nonprofits, increasing data collection and evaluation for program improvements, and staff training on the latest social service/workforce models.
- The limited capacity of community workforce development organizations reflects the large resource and power difference between the health care and social service sectors.[130] While the two sectors are becoming more aligned in their goals of serving the community, resource differences can lead to different perspectives regarding multi-sector collaboration, and may have these results:[131]

    1. Reluctance of health systems and hospitals to make referrals to social service organizations out of fear of capacity and quality issues
    2. Unfamiliarity of social service organizations with hospitals and health systems, and reluctance in navigating through these organizations
    3. Lack of understanding by health systems and hospital staff of the depths of the challenges or realities facing their most under-resourced patients, or why these patients have higher rates of readmissions

**Difficulties of workforce development programs in reaching populations with the greatest barriers to employment**

- Workforce development programs in San Francisco tend to be successful at reaching participants who have the fewest barriers to employment, but may not adequately serve the participants with the most significant barriers to employment. To be effective at reaching these individuals, workforce programs will need to partner with trusted neighborhood-level case management services and provide "transitional employment" or "bridge" programs that can train residents for a longer period of time, refer candidates who are truly ready to participate, provide ongoing support and retention services to trainees, and help communicate trainee needs and challenges to the training program and department supervisors. This comprehensive investment is expensive, and resources for it are scarce (currently most programs are funded through federal sources).[132] The current structure of funding for many workforce development organizations often provides only shorter-term (one-year) contracts, and does not allow for flexible spending. In this resource-constrained and competitive funding arena, programs are pressured to demonstrate how many people they serve, rather than who was served and what was the long-term impact.
- In the case of EXCEL, due to the out-migration of lower-income populations from San Francisco, the EXCEL program is experiencing a long-term trend of people entering the program being lower skilled and having greater needs.[133] The program is adapting by providing an intensification of training in certain areas, such as medical terminology and connection to the medical billing process. The program is also working more closely with the city's Human Services Agency to understand the challenges participants are experiencing, in order to provide appropriate interventions and support.

**Loss of social benefits due to changes in income and employment**

- One factor limiting the impact of workforce development programs is the loss of social support and benefits (including rent support, subsidized childcare and elderly care, food assistance and more) when low-income residents gain employment. This issue is especially concerning given the prohibitive cost of living – particularly the cost of housing and childcare – in San Francisco. For example, an EXCEL candidate, who was a single mother, had to reject a job offer with a $50,000 salary because it would have resulted in a loss of benefits that included subsidized childcare.[134] Currently, families lose their CalWORKs cash assistance if they have more than $2,250 in savings or other resources.[135] One policy solution that the city is exploring includes a workaround within city departments that would allow individuals to keep their CalWORKs assistance, which is managed at the state and federal level.[136] The Office of Early Care and Education (OECE) has also invested in quality childcare centers at HOPE SF sites, which are not restricted to low-income people.[137]

# Workforce Development Recommendations

### Recommendation I: Increase UCSF's Capacity to Train, Hire and Promote Under-Resourced Populations

| Steps | Description |
|---|---|
| 1.1 | Institutionalize local hiring goals (voluntary or otherwise) in collaboration with the UCSF Affirmative Action Plan targeting low-income populations and/or with a geographic focus on high-need and high-poverty neighborhoods in San Francisco (i.e., the southeastern neighborhoods of Bayview–Hunters Point, Visitacion Valley, Excelsior, Portola and Outer Mission, as well as the neighborhoods of Chinatown, the Tenderloin and the Western Addition), and adopt policies and practices that incentivize hiring managers. |
| 1.2 | Develop a robust HR data infrastructure for both campus and Medical that will allow internal analysis of job turnover, job vacancy, recruitment costs and more, in order to support workforce development efforts. |
| 1.3 | Foster a more intentional collaboration among human resources departments, hiring managers and workforce development programs to identify entry-level opportunities across the institution in various sectors (e.g., health care, food service, tech support, etc.) and connect opportunities to community and internal workforce development program graduates. |
| 1.4 | Develop an efficient communication system among UCSF HR departments and workforce development programs in order to provide ongoing retention and support services to program graduates. |
| 1.5 | Expand existing internal advancement training programs targeting entry-level, low-wage employees for lateral and upward career mobility within UCSF. Programs could provide frontline employees with career coaching, on-site hard and soft skills training, job shadowing and mentorship, case management and service referral, and educational supports such as college instruction at the workplace, release time and tuition advancement, remission or educational loans. See the next section, "Promising Workforce Development Initiatives," for promising practices. |

### Recommendation II: Strengthen UCSF's Workplace Climate and Cultural Competency

| Steps | Description |
|---|---|
| 2.1 | Conduct evaluation of workforce programs that include program participants and related departmental supervisors to understand internal workplace environment, needs and challenges. |
| 2.2 | Conduct evaluation of employee turnover and involuntary separation to (1) understand challenges facing UCSF employees, (2) identify populations that are especially vulnerable, and (3) create support programs targeting those populations to improve retention. |
| 2.3 | Continue to identify workplace issues around racism and discrimination through HR data, employee committees, surveys and interviews |
| 2.4 | Continue to provide campus-wide equity and inclusion trainings, targeting departments with workforce program participants or where there is clear racial disparity in management. |
| 2.5 | Collaborate with city agencies and other anchor institutions to align racial equity definition and goals. |

### Recommendation III: Increase Collaboration Between and Across Community Partners and Stakeholders

| Steps | Description |
|---|---|
| 3.1 | Leverage existing partnerships among UCSF, community organizations and other health care institutions in the city to understand current best practices, opportunities and challenges facing workforce development programs in the city's health care sector. |
| 3.2 | Institute a continual assessment of community workforce development needs. |
| 3.3 | Convene representatives from UCSF, community organizations, city agencies, workforce intermediaries, community foundations and other anchor institutions in the city to explore opportunities for scaling existing workforce development initiatives. |
| 3.4 | Ensure community representation in the governance of the Anchor Initiative. |
| 3.5 | Leverage funds from the institution, city agencies and community partners to initiate and sustain a citywide partnership. |

### Recommendation IV: Increase Effectiveness of the Education Pipeline for Under-Resourced Populations

| Steps | Description |
|---|---|
| 4.1 | Continue efforts under way as part of the Differences Matter Group #6 to identify challenges, opportunities, barriers and alignment opportunities among UCSF education pipeline, outreach and pathway programs. This group includes longstanding flagship initiatives such as the Center for Science Education and Outreach and the Science and Health Education Partnership, as well as programs in Oakland and Fresno. |
| 4.2 | Align UCSF education pipeline, outreach and pathway programs with local, place-based initiatives to tackle education attainment and achievement disparity, especially among and for under-resourced populations in the city (e.g., African American, Pacific Islander and Latino youth), and help fill in programmatic or resource gaps. |
| 4.3 | Identify opportunities to promote academic literacy for under-resourced transitional age youth (15- to 24-year-olds) and adult populations. |
| 4.4 | Partner with SFUSD, City College, SFSU and other educational institutions to identify skills needed for employment, and embed skill-building goals at different education levels into the school curriculum. |
| 4.5 | Connect education pathway programs with entry-level employment opportunities in the institution, and connect these opportunities to career pathways over time. |

# *Promising Workforce Development Initiatives*

## San Francisco

**Table 6: Promising Workforce Development Initiatives in San Francisco**

| Institution and Initiative | Focus of Initiative | Description |
|---|---|---|
| **California Pacific Medical Center's Development Agreement** | Local hiring and workforce development | As part of its 10-year development agreement with the city, California Pacific Medical Center (CPMC) provides local construction and non-construction hiring in partnership with the CityBuild and First Source programs of the San Francisco Office of Economic and Workforce Development (SFOEWD). The hospital also funds workforce development programs in partnership with The San Francisco Foundation, SFOEWD and workforce intermediaries JVS and Self Help for the Elderly. |
| **HOPE SF** | Local hiring, support services | HOPE SF is a public housing institution with sites in the southeastern neighborhoods of Bayview–Hunters Point, Potrero Hill and Visitacion Valley. In addition to housing, HOPE SF, in partnership with The San Francisco Foundation and community organizations, provides support services in conjunction with workforce training opportunities for residents, many of whom have barriers to employment. HOPE SF is also a part of the PHOENIX Project in Bayview, a collaborative of community-based nonprofits that are piloting a trauma-informed case management model designed to serve young people over a longer time period and as they move between multiple service providers.[138] |
| **Kaiser Permanente's SEIU Union Partnership** | Internal training and advancement | Kaiser Permanente in San Francisco partners with The San Francisco Foundation and the SEIU Union Education Fund to subsidize training for frontline service staff to become medical assistants. |
| **San Francisco Department of Public Health's Trauma Informed System Initiative** | Workplace training | The Trauma Informed System Initiative of the San Francisco Department of Public Health (SFDPH) provides a mandatory, foundational training on trauma for the entire SFDPH workforce, and provides trauma trainings to other city agencies as well.[139] |
| **San Francisco Department of Public Health MHSA Vocational Services[140]** | Vocational training and case management | The Mental Health Services Act (MHSA) funding for vocational services, administered by the SFDPH, assists consumers and family members in securing and maintaining meaningful employment. |
| **San Francisco Human Rights Commission's Racial Equity Trainings and Black to the Future Initiative** | Workplace training and community development | The San Francisco Human Rights Commission provides regular racial equity trainings, events and other resources to city agencies. The department also leads the city's Black to the Future initiative, a community-driven collaborative to empower African American youth and young adults through a continuum of culturally competent services.[141] |

| Institution and Initiative | Focus of Initiative | Description |
|---|---|---|
| **The CityBuild and First Source programs of the San Francisco Office of Economic and Workforce Development (SFOEWD)** | Workforce development and job connection | Among its many activities, SFOEWD provides sector-based training academies in health care, construction and other fields, as well as neighborhood access points for those services. SFOEWD also manages the First Source hiring program, which primarily refers trainees to CPMC. The office is also leading the Citywide Workforce Alignment Initiative, to align public workforce development programs and resources. |
| **San Francisco Public Utilities Commission's Community Benefits Program** | Community benefits focused on local workforce development and hiring | PUC's Community Benefits program has six focus areas: Workforce Development, Education, Arts, Environmental Justice & Land Use, Neighborhood Revitalization, and Small Business Opportunities. The program works with community and business partners to provide youth internship, local hiring and education outreach to the adjacent communities in southeast San Francisco. |
| **San Francisco Homeless Employment Collaborative**[142] | Vocational training and case management | The San Francisco Homeless Employment Collaborative (HEC) is a citywide collaborative of 10 community-based agencies that provide coordinated intake and assessment, vocational training, case management and other services to people who experience homelessness. |
| **The Alliance for My Brother & Sister's Keeper** | Education attainment | San Francisco's My Brother & Sister's Keeper, led by the City and County of San Francisco, SFUSD and The San Francisco Foundation, aims to improve education, employment and health outcomes for black and brown youth in San Francisco, ages 16–24.[143] |
| **University of San Francisco's Engage San Francisco** | Education and employment | Engage San Francisco is a Collective Impact University-community partnership among faculty, staff and students from all five colleges at USF, and residents and community organizations in the Western Addition neighborhood, to improve education, health, housing and employment outcomes for neighborhood residents.[144] |

## National

### Table 7: Promising Workforce Development Policies and Practices Nationally

| Policies and practices | | Relevant case studies | Does UCSF institute this policy or practice? |
|---|---|---|---|
| **Best practices for setting up a local hiring pipeline** | Designate geographic focus in high-poverty neighborhoods | University Hospitals (UH), Cleveland, OH; West Philadelphia Skills Initiative (WPSI), Philadelphia, PA; Johns Hopkins University and Health System (Johns Hopkins), Baltimore, MD; and the University of Colorado Anschutz Medical Campus (UC Anschutz), Aurora, CO | N |
| | Work with residents facing the greatest barriers to employment | Johns Hopkins; UC Anschutz; UPMC Hamot, Erie, PA | N |
| | Focus on jobs with clear career pathways | UH; WPSI; Grady Health System, Atlanta, GA; University of Maryland Medical Center, Baltimore, MD; Good Samaritan Hospital Medical Center, West Islip, NY; UPMC Hamot | Y |
| | Involve hiring managers in the training process | UC Anschutz; Partners HealthCare (Partners), Boston, MA; New Haven Works (NHW), New Haven, CT | N |
| | Set aside positions for cohort graduates | UH; UC Anschutz; NHW | N |
| **Intermediary strategies to build partnerships** | Offer wraparound supports and soft skills training | Alameda County Public Health Department's Emergency Medical Services Corps | Y |
| | Function in a hub/navigator role | UC Anschutz; NHW | N |
| | Work with a network of multiple employers | Baltimore Alliance for Careers in Healthcare (BACH), Baltimore, MD; Healthcare Training Institute, Boston, MA; Partnership for Direct Care Workers, Philadelphia, PA; WPSI; Stepping Up Rhode Island, Providence, RI; Greater Cincinnati Workforce Network's Health Careers Collaborative, Cincinnati, OH | N |

| | | | |
|---|---|---|---|
| **Institutional strategies to sustain local hiring efforts** | Foster collaboration between human resources and community health departments | Partners; WPSI | N |
| | Connect forecasting, training, and hiring departments | Johns Hopkins | N |
| | Connect to health system diversity and outreach goals | Partners | Y |
| | Leverage vendor contracts and connect to supply chain | UH | N |
| **Institutional strategies to sustain local hiring efforts** | Collaborate with other anchors and city economic development efforts | WPSI; Baltimore City Anchor Plan; Chicago Anchors for a Strong Economy | N |
| **Core strategies of building career pathways** | Offer job coaching for new hires, and map out potential career pathways | UH; Johns Hopkins; WPSI; Beth Israel Deaconess Medical Center, Boston, MA; BACH; Hartford Hospital, Hartford, CT | Y |
| | Provide release time for trainings accessible to frontline employees | Partners; UH; Drexel University | Y |
| | Provide higher education tuition assistance, in the form of scholarships, reimbursements and loans, for frontline employees | Children's Hospital, Boston, MA; Beth Israel Deaconess Medical Center; Women & Infants Hospital, Providence, RI; University of Colorado Hospital, Aurora, CO; Columbine Health Systems, Fort Collins, CO; Norton Healthcare, Louisville, KY | N |
| | Locate training programs and precollege and college-level "gateway" courses on-site | Beth Israel Deaconess Medical Center; Saint Anthony Hospital, Chicago, IL; Owensboro Medical Health System, Owensboro, KY; Humility of Mary Health Partners, Youngstown, OH; Good Samaritan Hospital | Y |

| Policies and practices | | Relevant case studies | Does UCSF institute this policy or practice? |
|---|---|---|---|
| **Best practices for facilitating internal advancement** | Utilize a cohort training model focused on specific positions | UH; WPSI; Owensboro Medical Health System | Y |
| | Partner with local educational institutions and community organizations | Kaiser Permanente SF SEIU Education Fund | Y |
| | Provide additional supports to build employee and community wealth | Kaiser Permanente SF SEIU Education Fund; UH | Y |

SECTION III

# PROCUREMENT

# *Introduction*

Procurement is the process of acquiring (procuring) the goods, services and work that are vital to an organization. The procurement process involves identifying needs, strategically vetting and selecting vendors, negotiating contracts and payment terms, and actually purchasing goods, services and work. An anchor procurement strategy allows health care institutions to align their purchasing of goods, services and work with their mission of advancing health, and in UCSF's case also health equity. Doing so requires the institution to identify how it can shift its spending, when possible, in order to support smaller, more diverse and more local businesses that are owned by or employ under-resourced populations. Purchasing from these businesses can contribute to the short- and long-term stability and vibrancy of these communities and neighborhoods and to individual households.

Purchasing from smaller, more diverse and local businesses can also create a multiplier effect that can increase local economic activity well beyond the initial purchase. Local purchasing helps recirculate wealth in communities where the businesses, their owners and employees reside. Research has shown that purchasing from local businesses will recirculate in the community more than money spent at national chains.[151] Local manufacturing businesses, for example, have a high employment multiplier, with each manufacturing job on average supporting 2.5 jobs in all other industries.[152]

The multiplier effect of UCSF procuring from more diverse vendors can have a significant impact on the economic and social well-being of low-income residents, as these businesses tend to be located in under-resourced neighborhoods and employ residents from the neighborhoods. Our analysis of the city's certified Local Business Enterprises (LBEs) reveals that the city's small, local and diverse businesses are most often located within the city's most impoverished neighborhoods. The neighborhoods with the most LBEs are Bayview/Hunters Point, Chinatown/ North Beach, Potrero Hill/ Mission Bay, Central/South of Market Area and Downtown/Financial District, with 312, 138, 133, 127 and 115 businesses, respectively. Businesses located in low-income neighborhoods tend to employ low-income residents. A 2015 report found that San Francisco manufacturers, which are often located in the low-income neighborhoods of Bayview–Hunters Point and southern Potrero Hill, employ more than 4,000 people, 70 percent of whom come from low-income households.[153,154]

Supporting diverse and/or small businesses, their communities, and their workers has many direct benefits for the institution. Hospital leaders from around the country that have committed to supplier diversity say that it contributes to cost savings, drives innovation and creates a more responsive and resilient vendor base.[155,156] For example, the vice president of general services and supply chain at Johns Hopkins Hospital and Health System states that local vendors are often more flexible and willing to adapt to the institution's needs, often at a lower cost.[157] In another example,

the chief administrative officer at University Hospitals (UH) in Cleveland, Ohio, stated that using local vendors can decrease transportation time and ensure that goods and services remain accessible if unexpected needs or emergencies arise.[158]

### Table 8: Diverse Vendor Classifications

Diverse suppliers are identified through various ownership-status certifications, some of which are outlined here:

| Acronym | Definition | More Information |
|---|---|---|
| SMALL | Small Business Enterprise | A Small Business Enterprise is a business that meets size requirements set by the U.S. Small Business Administration (SBA). These size standards define the maximum size that a business can be to qualify as a small business for a particular contract. The size standard varies according to the industry and NAICS code.[145] |
| MBE | Minority-Owned Business Enterprise | A Minority-owned Business Enterprise is an independent business concern that is at least 51 percent owned and controlled by one or more individual who are U.S. citizens and a minority group member; and whose management and daily operation is controlled by minority group members. Minority group members are United States citizens who are Asian, Black, Hispanic and Native American.146 |
| WBE | Woman-Owned Business Enterprise | A Women's Business Enterprise is an independent business concern that is at least 51 percent owned and controlled by one or more women who are U.S. citizens or legal resident aliens; whose business formation and principal place of business are in the U.S. or its territories; and whose management and daily operation are controlled by a woman with industry expertise.[147] |
| VET | Veteran-Owned Business Enterprise | A Veteran-Owned business is an independent business concern where veteran owner(s) have direct, unconditional ownership of at least 51 percent of the company and have full decision-making authority; the veteran owner(s) manage the company both strategically and on a day-to-day basis; and a veteran owner holds the highest officer position and is the highest-compensated employee.[148] |
| HUB | HUBZone Business Enterprise | A Historically Underutilized Business Zone (HUBZone)-certified business is a small business that is at least 51 percent owned and controlled by U.S citizens, a Community Development Corporation, an agricultural cooperative, a Native Hawaiian organization, or an Indian tribe; that is located in a federally designated HUBZone, with at least 35 percent of its employees living in a HUBZone.[149] |
| LBE | Local Business Enterprise | A Local Business Enterprise is a business with a principal place of business in San Francisco that meets specific industry-specific size thresholds set by the City and County of San Francisco and that is certified by the city's Contract Monitoring Division.[150] |

### Supplier Categories Often Sourced Locally

Anchor institutions that are committed to sourcing from local and diverse vendors have found that certain categories of spending are easier to source from local and diverse vendors than others. These categories, referred to as "movable spend," can be targeted in the early stages of the anchor institution initiative they include:

| |
|---|
| Advertising and Marketing |
| Catering and Food Service |
| Construction |
| Facility Maintenance and Security |
| Furniture |
| IT Services and Consulting |
| Janitorial Services |
| Lab Supplies and Equipment |
| Office Supplies and Equipment |
| Photo and AV Equipment |
| Printing Reproduction Services |
| Professional Services |

Sources: [1] Zuckerman, David and Parker, Katie. "Inclusive, Local Sourcing: Purchasing for People and Place." The Hospitals Aligned for Healthy Communities toolkit series. 2016. Accessed July 18, 2018. http://hospitaltoolkits.org/purchasing/
[2] JHHS Purchasing Department: HopkinsLocal." John Hopkins Medicine. N.d. Accessed July 18, 2018. https://www.hopkinsmedicine.org/purchasing/hopkinslocal.html.

## San Francisco Business and Sales Disparity

Purchasing from local, small and diverse vendors can help to address the significant sales disparities facing diverse businesses in San Francisco. Data from the 2012 Survey of Business Owners (the most recent available) shows:

- San Francisco had a total of 46,128 minority-owned businesses and 64,608 White-owned businesses. These numbers reflect a large disparity in business ownership between the percentage of minorities living in San Francisco and the share of businesses owned by individuals from minority groups. In 2010, minorities made up 62 percent of the population of San Francisco, but accounted for only 41 percent of all business owners in 2012.[159,160]
- This disparity was most prominent in the Hispanic/Latino and African American groups. Despite making up 15 percent and 6 percent of San Francisco's population, respectively, Hispanic/Latino and African American-owned businesses accounted for only 9 percent and 4 percent of the city's total businesses.[161] This disparity reflects larger systemic disparities in wealth and capital access.
- There is a large disparity between the proportion of minority-owned businesses and the proportion of sales by minority-owned businesses. Although 41 percent of total businesses in San Francisco are "minority-owned," these businesses are responsible for only 19 percent of all sales value in the city (approximately $10 billion annually).[162] In sharp contrast, the total sales value by White-owned businesses is approximately $43 billion.[163]
- Across all businesses owned by racial and ethnic minority groups (i.e., African American, Hispanic/Latino, Asian, etc.), the total sales value was greatly disproportionate to the number of businesses (Table 8). For example, Hispanic/Latino-owned businesses accounted for 9 percent of total firms, yet only 3 percent of total sales value. African American–owned businesses accounted for 3 percent of total firms, yet less than 1 percent of total sales value (0.81 percent). In contrast, White-owned businesses accounted for more than half of total firms (56 percent), and 79 percent of total sales value (approximately $43 billion).
- This sales disparity reflects larger disparities related to access to business contracting and opportunities, and the concentration of minority businesses in industries with lower sales. Nationally, almost half of all minority businesses are in the 20 industries with the lowest sales, compared with only 30 percent of all non-minority businesses.[164]

- While minority firms constitute 29 percent of all businesses in the nation, they make up only 17 percent of the businesses in the top 20 employment industries and 13 percent of the top 20 revenue-generating industries (Figure 12).[165]

The 2017 "Contracting Barriers and Factors Affecting Minority Business Enterprises" report by the U.S. Minority Business Development Agency confirms that disparities exist between minority-owned businesses and non-minority-owned businesses, and that the disparity is especially pronounced for major industry groups such as construction, professional services, architecture and engineering services, and goods and supplies.[166] The report found that minority-owned businesses face both discriminatory and non-discriminatory barriers to contracting, with discriminatory barriers ranging from outright prejudicial treatment and instances of exclusion based on racism, to marketplace barriers erected by systematic discrimination in both the private and public market (e.g., access to capital).[167] Non-discriminatory barriers include large project sizes, timely payment and bid requirements that present challenges to potential bidders regardless of

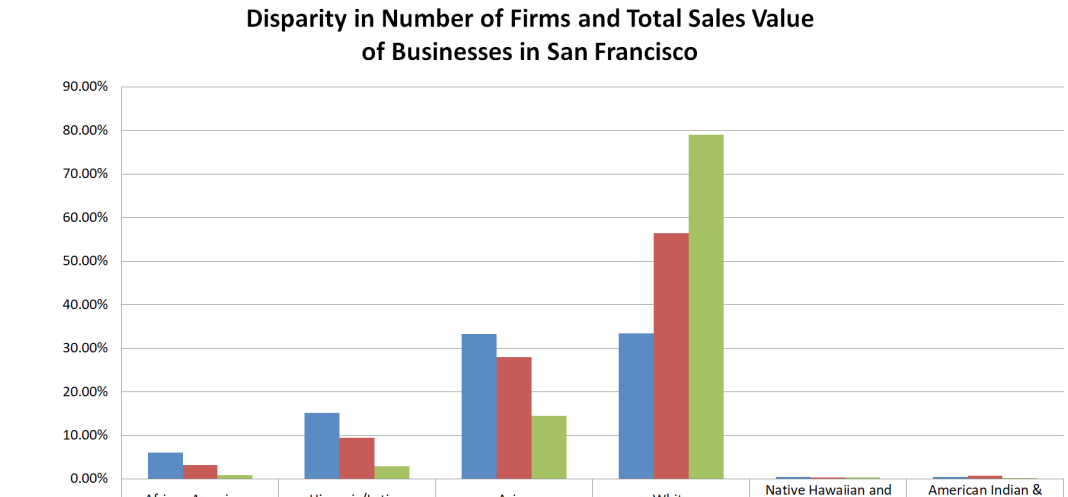
## How UCSF Can Benefit from Inclusive, Local Purchasing

A report written for the "Hospitals Aligned for Healthy Communities" toolkit series outlined the advantages of medical institutions purchasing locally. They include:

- Addressing supply chain needs and gaps
- Creating a more efficient and resilient supply chain
- Generating a thriving local business community
- Improving the quality of local jobs
- Increasing community impact by targeting underserved neighborhoods
- Leveraging existing philanthropic and public funds
- Aligning sustainability, diversity and inclusion, and community benefit priorities
- Reducing unnecessary and costly utilization of medical services
- Strengthening the institution's reputation as the provider of choice for its community

Source: Zuckerman, David and Parker, Katie. "Inclusive, Local Sourcing: Purchasing for People and Place." The Hospitals Aligned for Healthy Communities toolkit series. 2016. Accessed July 18, 2018. http://hospitaltoolkits.org/purchasing/.

**Figure 12: Disparity in Number of Firms and Total Sales Value of Businesses in San Francisco**




| | African Americans | Hispanic/Latino | Asian | White | Native Hawaiian and Other Pacific Islander | American Indian & Alaska Native |
|---|---|---|---|---|---|---|
| % of Population | 6.07% | 15.12% | 33.27% | 33.36% | 0.42% | 0.50% |
| % of Firms | 3.17% | 9.43% | 28.03% | 56.41% | 0.33% | 0.80% |
| % of Sales | 0.81% | 2.91% | 14.52% | 79.00% | 0.29% | 0.02% |

Source: U.S. Census, 2012 Survey of Business Owners; 2010 Census

the race or ethnicity of the owners, though these non-discriminatory barriers may also be influenced by systemic discriminatory barriers.[168]

## UCSF Procurement Landscape

UCSF can use its procurement resources to create more opportunities for business owners and entrepreneurs who come from San Francisco's under-resourced communities and populations, and to address existing business disparities in the city. In 2016-17, UCSF spent more than $1.1 billion on goods and services ($730 million on supplies and materials, and $443 million on professional and purchased services).[169] If UCSF's procurement policies and purchases can be aligned with the institution's mission of advancing health equity, the sourcing of goods, services and food can help to build community wealth and create a positive impact on health outcomes. By making a concerted effort to spend even a small portion of these procurement dollars with local businesses that are owned by or employ under-resourced populations, UCSF can play a substantial role in expanding economic and health equity in San Francisco.

### Analysis of UCSF Campus Procurement Spending

UCSF is already having a positive economic impact in San Francisco by purchasing from local, small and diverse businesses, though the proportion relative to total spending remains small. But given the institution's impressive spending, UCSF could do more to increase spending with small and diverse businesses located in high-need and high-poverty neighborhoods, particularly if these businesses are hiring local residents in need of employment.

## UCSF Campus Procurement

In 2017, approximately 8 percent ($63.5 million) of UCSF's spending was with small businesses, some of which are owned by members of groups that are diverse, historically under-resourced or both (Table 9). But it is important to point out that some of these businesses are located outside of San Francisco. Table 9 breaks down UCSF campus small business spending by diverse small business classifications.[170] Despite the fact that nearly half of the campus small business spending is conducted with diverse businesses, as a whole diverse business spending represents only 3.89 percent (approximately $31 million) of total procurement spend. UCSF could do more to examine San Francisco's small business landscape and identify opportunities for increasing spending with diverse small businesses.

**Table 9: UCSF Small Business Spending by Diverse Business Classifications**

Francisco. This includes spending with large and small firms. Of the $115.6 million UCSF spends annually with San Francisco businesses, more than 50 percent of this spending takes place in five zip codes, which include the Financial District, Downtown, part of Chinatown, Potrero Hill and South of Market neighborhoods. Table 10 shows UCSF's spend for the five San Francisco zip codes where UCSF spends most of its procurement dollars.

| Diverse business category | Spend | Percent of small business spend | Percent of total spend |
|---|---|---|---|
| Woman-owned business | $14,581,527 | 22.95% | 1.82% |
| Minority-owned business | $11,764,343 | 18.51% | 1.47% |
| Historically under-resourced business | $9,751,040 | 15.35% | 1.22% |
| Veteran-owned business | $3,899,697 | 6.14% | 0.49% |
| Business owned by disabled individual(s) | $1,132,834 | 1.78% | 0.14% |
| LGBT-owned business | $4,725 | 0.01% | 0.00% |
| Diverse business total | $31,175,631 | 49.06% | 3.89% |
| Small business total | $63,541,918 | 100% | 7.93% |

*Note: Diverse business categories overlap; for example, a business may be both woman- and minority-owned.

Almost 15 percent of UCSF's procurement dollars are spent within the City and County of San

### Table 10: UCSF Spending in San Francisco

| Zip code | Neighborhood | Spend | Percent of SF spend | Percent of total spend |
|---|---|---|---|---|
| 94108 | Financial District/ Chinatown | $22,867,767 | 19.78% | 2.86% |
| 94107 | Potrero Hill | $13,913,430 | 12.03% | 1.74% |
| 94103 | South of Market | $12,056,022 | 10.43% | 1.51% |
| 94111 | Financial District | $9,179,531 | 7.94% | 1.15% |
| 94120 | PO box zip code | $7,072,189 | 6.12% | 0.88% |
| All SF zip codes | — | $115,614,545 | 100% | 14.43% |

Note: Only data for the six zip codes with the most UCSF procurement spending are shown here.

### Table 11: UCSF Small Business Spending in the Bay Area

| City | Spend | Percent of Bay Area spend | Percent of total spend |
|---|---|---|---|
| San Francisco | $115,614,545 | 48.72% | 14.43% |
| Oakland | $23,268,071 | 9.81% | 2.91% |
| Alameda | $23,032,177 | 9.71% | 2.88% |
| Redwood City | $11,547,656 | 4.87% | 1.44% |
| Sunnyvale | $10,357,081 | 4.36% | 1.29% |
| Stanford | $7,420,576 | 3.13% | 0.93% |
| Bay Area | $237,289,289 | 100.00% | 29.63% |

Note: Only data for the six Bay Area cities with the most UCSF procurement spending are shown here.

At the regional level, UCSF spends 30 percent of its total procurement dollars in the Bay Area, with more than 80 percent of Bay Area procurement dollars going to six cities. Table 11 shows UCSF spend for the six Bay Area cities where UCSF spends most of its procurement dollars.

In summary, UCSF spends approximately 7.93 percent of its procurement dollars with small businesses. About half of this small percentage is spent with diverse or historically under-resourced businesses. About 30 percent of UCSF's total procurement spending is in the Bay Area, and 14 percent of total spending is with businesses within San Francisco. The vast majority of UCSF's regional and local procurement dollars are flowing into large businesses. UCSF could explore methods for spending more of its dollars with diverse small businesses.

### Vizient's Supplier Diversity Initiatives

Vizient, UCSF's primary group purchasing organization (GPO) and the nation's largest GPO when ranked by annual spend volume, has several initiatives to promote diverse supplier spending:

- In 2010, Vizient invested $40 million in data analytic capabilities to improve transparency across the health care supply chain.
- Vizient collaborates with the Healthcare Supplier Diversity Alliance (HSDA), Tuck Business School at Dartmouth College, and Novant Health to offer "Building a High-Performing Minority Business," a five-day training program.
- Vizient provides a database of registered small and certified diverse suppliers.
- Parkland Health and Hospital System, one of the largest public hospitals in the country and the primary teaching hospital for the University of Texas Southwestern Medical Center, has worked with Vizient to identify and source from more local vendors. In addition, Parkland has worked with Vizient to add a regional printing company to Vizient's contract portfolio, connecting the company to other regional institutions served by Vizient.

Sources: [1]Gooch, Kelly. "4 of the Largest GPOs: 2017." *Becker's Hospital CFO Report*. February 2017. Accessed July 18, 2018. https://www.beckershospitalreview.com/finance/4-of-the-largest-gpos-2017.html.
[2] "About Us." *Vizient*. N.d. Accessed July 18, 2018. https://www.vizientinc.com/about-us#A%20new%20company%20with%20deep%20roots.
[3]"Novation Continues Commitment to Assist Minority Business Owners." *Vizient*. September 2015. Accessed July 18, 2018. http://newsroom.vizientinc.com/press-release/novation/novation-continues-commitment-assist-minority-business-owners.
[4]"Supplier Diversity: Recognizing Small and Diverse Suppliers." *Vizient*. 2018. Accessed July 18, 2018. https://www.novationco.com/apps/diversity/.
Zuckerman, David and Parker, Katie. "Inclusive, Local Sourcing: Purchasing for People and Place." The *Hospitals Aligned for Healthy Communities* toolkit series. 2016. Accessed July 18, 2018. http://hospitaltoolkits.org/purchasing/.

## UCSF Health Procurement

UCSF Health spends more than $400 million annually on goods and services (not including pharmaceutical and real estate/construction spend).[171] UCSF Health's procurement is managed through the UCSF Health Supply Chain Management department, which is responsible for handling purchase requests from about 10 clinician groups.[172] The majority of UCSF Health purchases are consistent and automated, and from a total of more than 700 purchase requests, the Supply Chain Management staff handle only about 150.[173] As is common with health systems around the country, a significant amount of purchases are made through group purchasing organizations (GPOs), which are entities that pool the demand and make purchases on behalf of hospitals from around the country in order to lower purchasing costs. For example, UCSF spends approximately $85 million through its primary GPO, Vizient.[174] Vizient is the largest GPO in the U.S. when ranked by annual spend volume (approximately $100 billion annual spend volume), and provides services to nearly 30 percent of the nation's hospitals, including nearly all the academic medical centers.[175,176]

UCSF Health has approximately 600 vendors listed in its database.[177] However, due to the nature of the software used to load new vendors in the system (which is more than 20 years old), vendors are not tracked based on their ownership status.[178] The department is currently

**Table 12: UCSF Health Diverse Procurement Through Vizient**

| Diverse business category | Supplier-reported sales to Vizient for year ending March 2018 | Number of contracts |
|---|---|---|
| Small Business | $1,544,840 | 145 |
| Veteran Owned | $186,638 | 33 |
| Women Owned | $32,346 | 53 |
| Minority/Women Owned | $16,030 | 10 |
| Minority Owned/Veteran Owned | $12,335 | 62 |
| Total | $1,792,190 | 303 |

working to add a field that tracks ownership status, though this was not available at the time this report was published.. However, an analysis of diverse spending through Vizient in the 12 months prior to March 2018 showed that UCSF Health provided 303 contracts to small and diverse vendors, for a total sales value of approximately $1.8 million, or less than one percent of total spend (Table 12).[179]

UCSF Health is a part of UC Health, a component of the University of California Office of the President (UCOP) that provides leadership and strategic direction for UC's five academic medical centers and 18 health professional schools.[180] Part of the mission of UC Health is "Work hand in hand as strategic partners with medical center leadership and our vendors to strategically optimize system wide purchasing to create significant savings for the University of California."[181] Specific UC Health goals include:

- To increase system collaboration through staffing and deployment of strategic sourcing teams
- To innovate an engagement model with clinicians around medical supply selection and utilization
- To deliver $100 million in annual benefit (or savings) by end of fiscal year 2016
- To deliver $150 million in annual benefit (or savings) by end of fiscal year 2017 [182]

Fortunately, as we show in this report, procuring from diverse, local businesses often results in cost savings for institutions.

## Current UCSF Policies for Diverse and Local Spending

UCSF procurement policies are developed by the University of California Office of the President (UCOP). As stated in UCOP's "BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management" document, "The University supports the use of small, diverse, and under-resourced suppliers whenever these suppliers offer products and services that meet the University's needs for competitive pricing and the quality of the products and services. The University [UCOP] has not set specific goals for procurement from any classification of business." Similarly, UCSF has not developed formal goals relating to the use of local, diverse or under-resourced businesses. However, UCOP is considering updating the Sustainable Practices Policy to include a goal of 25 percent Economically and Socially Responsible Spend (EaSR) by fiscal year 2022-23, which would apply to

all UC campuses (not including Construction, Medical Centers, or the Lawrence Berkeley National Laboratory).[183] EaSR spend includes small, disadvantaged, women-owned, minority-owned, and veteran-owned business enterprises.[184,185] This policy would align UC diverse procurement goals with those of the State of California (which has surpassed its 25 percent small business spend goal) as well as the City and County of San Francisco's Local Business Enterprise ordinance (which sets different goals for covered contracts, but has a 20 percent minimum LBE subcontracting goal per project).[186,187]

For all purchase agreements exceeding $100,000 annually, a competitive bidding process must be undertaken where bids are obtained from at least three separate suppliers. Bidders are frequently chosen based on past experiences at UCSF or other UC campuses conducting similar scopes of work.[188] Open bids for all UC campuses, including UCSF, are publicly listed on UCOP's website along with contact information for suppliers interested in competing for a bid. However, there are no requirements dictating the involvement of diverse businesses in the bidding process. For Purchase Agreements not exceeding $100,000 annually, no formal bidding process is required. However, purchasing decision makers are encouraged to obtain at least three informal quotes from potential suppliers in order to ensure competitive pricing. Again, there are no requirements dictating the involvement of diverse or local businesses in the bidding process.

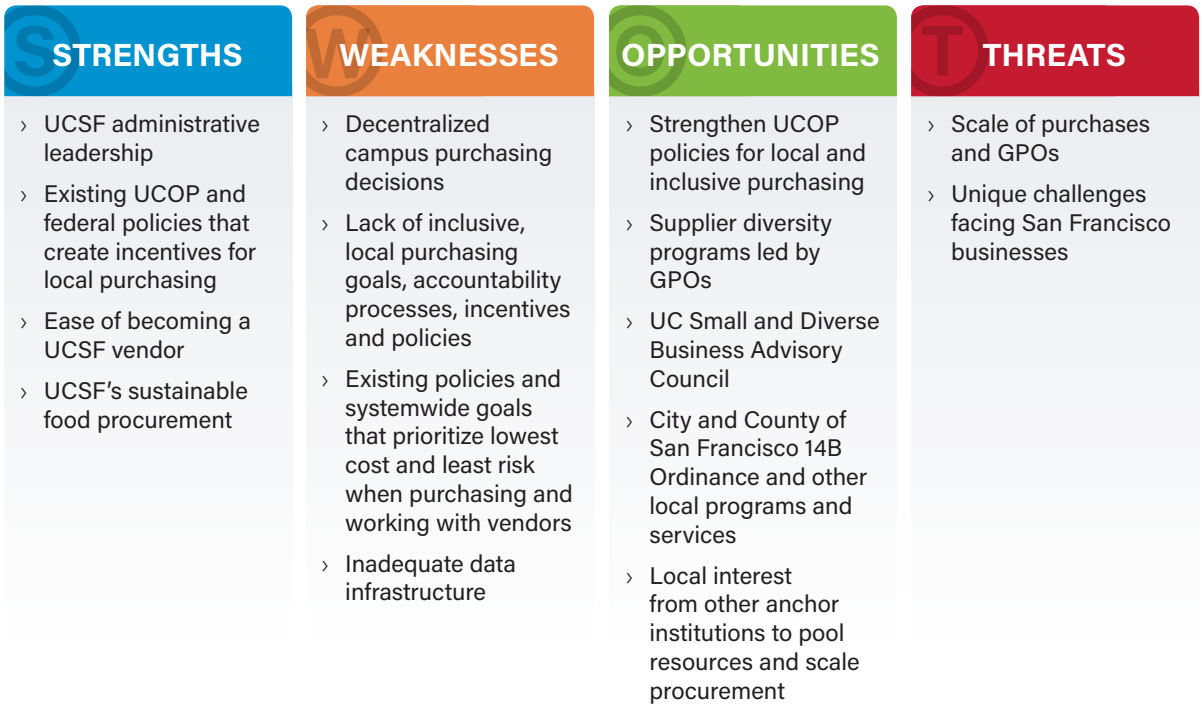
### Federal Small Business Subcontracting Program

The Federal Small Business Subcontracting Program requires that any recipient of more than $700,000 in federal funding, either as a prime contractor or subcontractor, submit a Small Business Subcontracting Plan.[189,190] The federal criteria for small business subcontracting include the small, veteran-owned, service-disabled veteran-owned, disadvantaged, women-owned and HUBZone small business classifications.[191] Principally, the subcontracting plan must include separate percentage goals and the total dollars planned to be subcontracted with small and diverse businesses.[192] The plan must also include the principal types of supplies and services to be subcontracted, and explicitly state how the primary contractor intends to comply with the plan.[193] UCSF is the second highest grant recipient of National Institutes of Health (NIH) funding nationwide, with approximately $594 million in grants awarded. For this reason, the Small Business Subcontracting Program is a great opportunity to leverage the institution's spending in support of small and diverse businesses that are owned by or employ under-resourced populations in San Francisco.[194]

# *SWOT Analysis of UCSF Procurement Strategy*

Interviews with UCSF and community stakeholder combined with research on UCSF's workforce programs, yielded the following Strengths, Weaknesses, Opportunities and Threats (SWOT) for UCSF's procurement strategy.

**Figure 13: SWOT Analysis of UCSF Procurement Strategy**




## STRENGTHS

### Administrative leadership

- Much of the best work around local and diverse procurement at UCSF has been spearheaded by motivated leadership within purchasing departments.
- One example is provided by Andrew Clark, director of Strategic Sourcing for UCSF campus Supply Chain Management, who is leading the initiative to better categorize and track internal spending across the campus; an important prerequisite for local, inclusive purchasing.
- Another example is provided by Dan Henroid, director of Nutrition and Food Services for UCSF Health, who has been instrumental in UCSF Health's achieving 47 percent of total spend on sustainable food, surpassing its goal of 20 percent.[195] In addition, Dan is looking into opportunities to pool collective local purchasing power between local and regional "Eds and Meds" institutions.

### Existing UCOP and Federal policies and incentives

- UCOP's Sustainable Practices policy contains a food procurement goal of "20 percent sustainable food products by the year 2020" (policy III.H.1.a).[196] This has served as a catalyst for UCSF to direct food procurement spending toward local, sustainable vendors.

- The federal Small Business Subcontracting Program requirements have helped to promote local, inclusive spending. In general, federal grants and contracts exceeding $700,000 require UCSF to prepare a Small Business Subcontracting Plan, which must contain total percentages and dollar amounts to be spent with large and small businesses. Furthermore, UCSF must make a good faith effort to source as many goods and services as possible from small businesses, while still meeting the technical specifications of the project. As the second highest grant recipient of National Institutes of Health (NIH) funding nationwide, with approximately $594 million in grants awarded, UCSF can leverage this program compliance to generate significant benefits to local and diverse businesses in San Francisco and beyond.

**Ease of becoming a UCSF vendor**

- It is actually fairly easy to become a vendor with UCSF. The process involves completing and submitting the UCSF Substitute W-9 and Supplier Information Form. The application is then reviewed and entered into UCSF's PeopleSoft supplier database within three business days upon receipt of the completed form, after which the vendor is eligible to do business with UCSF.[197]
- The process is managed by the Supplier Registration team in Supply Chain Management. Internal staff noted that the challenge is not becoming a vendor, but rather persuading department managers to purchase from specific vendors.[198]

**Local food procurement**

- As noted earlier, UCOP's Sustainable Practices policy contains the goal of 20 percent sustainable food products by the year 2020. UCSF Health, through the Nutrition and Food Services department, has long surpassed that goal, achieving 47 percent in FY 2017.[199]
- The department has also spearheaded other initiatives to improve internal food procurement, such as launching new green leaf icons for the America-To-Go (ATG) catering system that help UCSF meeting and event planners identify on-campus and off-campus caterers certified by the Office of Sustainability as meeting UCSF's zero waste and sustainable food requirements.[200]
- Another recent program is "Roots & Shoots," a program that allows food service customers to order a healthy meal that includes several salads with a small protein side, in order to reduce meat consumption, cut greenhouse gas emissions and improve customer health. The program was designed in partnership with Menus of Change, an initiative by the Culinary Institute of America and the Harvard School of Public Health.[201]

## WEAKNESSES

**Decentralized campus purchasing**

- Most purchasing decisions at UCSF campus are made at the level of an individual department or faculty-led research group. With 28 departments and nearly 3,000 faculty members, UCSF has countless purchasing decision makers with varying interests, goals and budgets.
- Last year, purchases were made by nearly 1,200 distinct purchasing decision makers on UCSF's campus alone. This large number makes the adoption of University-wide anchor institution policies and practices a difficult and time-consuming process.

- UCSF's Supply Chain Management division cannot simply choose to allocate more spending toward diverse local businesses. Instead, new spending practices must be initiated and enforced at the level of an individual department or research group.

**Lack of local, inclusive purchasing goals and accountability process**

- UCOP's "BFB-BUS-43 Purchases of Goods and Services; Supply Chain Management" document explicitly states, "The University has not set specific goals for procurement from any classification of business."[202]
- Unlike private and nonprofit health systems, which can set their own purchasing goals around local, small and diverse purchasing, UCSF policies must comply with UCOP's priorities. Currently, UCSF does not have any explicit purchasing goals in place, apart from the sustainable food goal. The lack of established goals makes it difficult to incentivize purchasing managers to shift their purchases toward businesses that reflect UCSF's own mission and vision.

**Existing cultural norms around cost and risk reduction**

- UCSF's procurement policies and practices (outlined in the BFB-BUS-43 and SC 500 policies) are designed to value, above all, lowest price and risk. When purchasing decisions are made, UC policy permits the following primary considerations: (1) Is the product or service being procured the least expensive option, while still providing an acceptable level of quality? Or (2) Is the product or service the best value when considering the total life-cycle cost of the product/service and the reputation and service levels contracted from the supplier. The consideration of diverse business status or proximity to campus rarely enters the calculations.
- As Steve Standley, chief administrative officer at University Hospitals (UH) in Cleveland, Ohio, described in the "Inclusive, Local Sourcing" report, "The old school culture in procurement is to be a 'tough negotiator'… That's one of the cultural biases that affect creating value-based partnerships with vendors. There's the old school buyer beware methodology."[203] Changing this culture will require institutionalized purchasing goals that are aligned with the institution's mission, and an accountability process to ensure these goals are prioritized and reached.

**Inadequate data infrastructure**

- UCSF campus, through the Supply Chain Management department, has only recently begun to track spending by supplier zip code, diverse business classification, and category of good or service being procured (e.g., laboratory equipment and supplies, IT and software, etc.). Because zip codes are assigned based on billing addresses, they may not reflect where a supplier conducts its operations or hires its workers. Thus, UCSF spending in various zip codes may over- or underestimate UCSF's economic contributions to a given region or neighborhood.
- More than 60 percent of UCSF's small business spending remains unclassified, meaning the category of good or service being procured is not tracked. This lack of tracking will make it difficult to identify the areas of spend can be shifted to local and diverse businesses.
- There is currently no formal process within UCSF for identifying opportunities to increase spending with local, small and diverse suppliers.

## OPPORTUNITIES

### UCOP policy change

- UCOP is considering adding strong language around Economically and Socially Responsible Spend (EaSR) as part of its Sustainable Practices policy document (the definition for EaSR Spend has not yet been finalized). If implemented, all UC campuses would be required to have 25 percent EaSR spend as a total percentage of addressable spend within five fiscal years of adoption; sustainable purchasing reporting requirements on EaSR spending beginning at the close of fiscal year 2018-19; and allocating a minimum of 15 percent of the points utilized in solicitation evaluations to sustainability criteria. Criteria may include, but is not limited to, sustainable product attributes, supplier diversity, supplier practices, contributions to health and wellbeing, and materials safety.[204] The policy will apply to all UC campuses, but not the UC health systems. For full the policy, see Appendix XI.
- This policy change is a great opportunity for UCSF to align its purchasing with its mission of achieving health equity, and the institution could leverage its influence at the state level to have the policy adopted with the strong language that currently exists. The policy change would also dovetail with this anchor institution initiative, and the University could develop an action plan in preparation for the policy change. The action plan and strategies to increase EaSR spending could be integrated across the campus, and involve both UCSF campus and UCSF Health. In addition, UCSF can build on the ample experiences of existing San Francisco local and inclusive purchasing initiatives, which we discuss in more detail later in this section.
- UCOP estimates that UCSF currently has an 11.68 percent EaSR spend.[205] This estimate means that, in order to achieve the 25 percent goal by FY 2022-23, UCSF would have to more than double its current small and diverse spending. Although this goal may seem difficult to accomplish, in the past, UCSF has been a trailblazer in achieving set goals. UCSF's ability to meet goals is most evident with the implementation of the 20 percent sustainable food purchasing policy, which UCSF achieved many years in advance of the deadline.

### Supplier diversity programs led by GPOs

- GPOs across the country increasingly recognize the demand, and need, to increase supplier diversity. As a result, many GPOs have established their own supplier diversity programs and are increasingly open to working with health systems to increase their diverse vendor pool.
- Vizient – the nation's largest GPO when ranked by annual spend volume, and UCSF's primary GPO – has created a diverse vendor database and has partnered with other health systems to increase supplier diversity.[206] For example, the Parkland Health and Hospital System, one of the largest public hospitals in the country and the primary teaching hospital for the University of Texas Southwestern Medical Center, has worked with Vizient to identify and source from more local vendors.[207] Parkland has also worked with Vizient to add a regional printing company to Vizient's contract portfolio, connecting the company to other regional institutions served by Vizient.[208]
- Some GPOs have also established supplier diversity programs that facilitate supplier diversity among first- and second-tier suppliers and health care organizations.[209] These programs pair second-tier small and diverse businesses, which may not have the capacity to meet the large bonding requirements of first-tier suppliers, with first-tier suppliers contracted to a customer for goods and services.

**UC Small and Diverse Business Advisory Council**

- The University of California Small and Diverse Business Advisory Council was created in April 2017 to "provide a forum for businesses, business affiliate organizations and business trade associations to comment and provide feedback on UC policies and practices that affect or impact small and diverse business utilization and participation in UC contracts and projects."[210] The council meets quarterly and currently has projects focusing on (1) improving business pipeline transparency; (2) a campus case study of UCLA procurement practices; (3) visiting best practice sites; (4) developing an economic impact report.[211] This council can serve as a valuable resource for knowledge sharing, advising, forming partnerships and more, and UCSF procurement staff could continue to stay involved as the institution explores the anchor procurement strategy. Furthermore, as UCSF's procurement strategy develops, the institution can share its findings and best practices through this forum and serve as a valuable case study for all UC campuses, particularly as UCSF Health continues to be involved.

**City and County of San Francisco 14B Ordinance and other local programs and services**

- UCSF is not the only San Francisco institution interested in local and inclusive purchasing. One example is the City and County of San Francisco's Chapter 14B: Local Business Enterprise Utilization and Non-Discrimination in Contracting Ordinance. In 2015, to foster a strong and vibrant network of small and very small micro businesses in San Francisco, and to ensure that these businesses can compete for public contracts on a level playing field, the San Francisco Board of Supervisors adopted the Chapter 14B Local Business Enterprise (LBE) ordinance into the San Francisco Administrative Code, requiring LBE participation goals in city contracts. The LBE program is managed by the city's Contract Monitoring Division (CMD). For more information on the program, see the "Promising Procurement Initiatives" section later in this report.
- When implementing UCSF's own purchasing initiative, the institution could consider partnering with CMD for guidance on data tracking, compliance strategies and vendor connection. In addition, the partnership could identify strategies to engage other local institutions, and build the capacity of local businesses through outreach events, mentorship programs, and more. In 2017 CMD and City Administrator Naomi Kelly tried to partner with UCSF, but at the time we published this report, UCSF has chosen to continue utilizing its current procurement strategies.[212]
- In addition to CMD, UCSF could look to partner with the numerous other organizations providing support services to San Francisco small businesses. For a full list of organizations and the services they provide, see Appendix XII.

**Local interest from other anchor institutions to pool resources and scale procurement**

- In the East Bay, the Emerald Cities Collaborative's Anchors in Resilient Communities (ARC) East Bay partnership is exploring opportunities to leverage the purchasing power of the region's anchor institutions (including Kaiser Permanente and K-12 educational institutions) to expand local jobs and opportunities, and to improve health outcomes for low- and moderate-income communities in the area.[213] A recent study of the institutions involved in ARC found that there are business opportunities in the sectors of healthy food, clean energy/green building and construction, and green enterprises.[214] The ARC initiative is currently focused on a project known as "My-Cultiver" that will deliver healthy, prepared meals sourced from local, cooperatively

owned food production, processing and preparation businesses, to partnering anchor institutions. UCSF is one of the institutions involved with the initiative.[215]

## THREATS

**Scale of purchases and GPOs**

- Some of the products or services demanded by large academic medical institutions such as UCSF require production at a scale that is difficult for small businesses to achieve. This reflects conditions nationwide, where approximately 72 percent of all health system purchases are made through large-scale group purchasing organizations (GPOs).[216]

**Unique challenges facing San Francisco businesses**

- Like many of its residents, local small and micro businesses owners face a series of challenges associated with living and working in San Francisco. For example, San Francisco currently has a growing production, distribution and repair (PDR) sector made up of more than 700 manufacturers and more than 2,000 PDR businesses overall that, together, employ more than 30,000 people.[217] These businesses face unique challenges that include lack of affordable and suitable space, difficulty in obtaining commercial bank loans or equity investments, difficulty in finding and retaining workers and more.[218]
- The lack of affordable and suitable space is particularly pressing as a direct result of the ongoing development of Mission Bay, which spans more than 300 acres and serves as the hub of San Francisco's world-class life sciences industry.[219] In 2017 SFOEWD's business development manager for the PDR sector had to provide retention and relocation technical assistance to multiple businesses in the area because of market changes in Mission Bay.[220] However, the expansion of Mission Bay does not have to come at a loss to existing businesses. UCSF, as the anchor tenant in the area, could explore opportunities to contract with local businesses in the southeastern neighborhoods, particularly those that are owned by or employ under-resourced populations. Through an intentional procurement strategy, UCSF can help to stabilize existing businesses, maintain local jobs and opportunities, and serve as a model for other tenants in the Mission Bay area.

**Proposition 209**

- Proposition 209, approved by California voters in November 1996, is a constitutional amendment requiring that government entities "shall not discriminate against, or grant preferential treatment to, any individual or group on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, public education, or public contracting."[221] While state and federal law already prohibits such discrimination, Prop 209's prohibition on "preferential treatment" places considerable limits on affirmative action in public contracting.[222] These limits includes eliminating quotas, set-asides, "rigid" numerical formulas giving preference on the basis of race and gender, and outreach efforts targeted solely to WBEs and MBEs.[223] Since Prop 209 does not eliminate all forms of affirmative action, affirmative steps could be taken in three areas: (1) race-neutral and gender-neutral preferences that may disproportionately benefit MBEs and WBEs; (2) outreach efforts that target WBEs and MBEs,

along with other business enterprises; and (3) data collection to assist contracting agencies in determining whether contracts are awarded in an inclusive and non-discriminatory manner.[224] For more information, see Appendix XIII.

# *Procurement Recommendations*

**Recommendation I: Define UCSF's "Movable Spend" (purchasing categories that can be sourced from small, local businesses that are owned by or that employ under-resourced populations).**

| Steps | Description |
|---|---|
| 1.1 | Begin tracking category of spending for all purchases as well as spending with micro businesses and quantitative metrics for diverse procurement. (review table 5) |
| 1.2 | Identify categories of spending within UCSF Supply Chain Management that are well suited for increased spending with small and diverse vendors (e.g., food services, laundry and office supplies). |
| 1.3 | Speak with department-level UCSF purchasing decision makers to identify opportunities for streamlining the involvement of diverse businesses in the procurement process. |

**Recommendation II: Institutionalize Local and Inclusive Purchasing Through the Adoption of Explicit Goals, Policies and Practices**

| Steps | Description |
|---|---|
| 2.1 | Leverage UCSF's influence on UCOP to adopt and add strong language around local and inclusive purchasing, similar to the sustainable food purchasing goal. |
| 2.2 | Implement an internal communication strategy to educate department-level purchasing managers and administrators on the institution's supplier diversity goals and programs. The supplier diversity program could be framed as a strategic and business imperative that will provide a competitive advantage to the organization, rather than a quota system or social program. |
| 2.3 | Incorporate local and diverse spending goals into performance metrics for managers and executives. For example, Grady Health System, a large academic health system serving the Atlanta metro area, incorporated the organizational goal of 20 percent spend with minority businesses into performance metrics for the health system's clinical and nonclinical vice presidents.[225] |
| 2.4 | Incorporate small, local and diverse vendor participation requirements in the bid solicitation process. For example, University Hospitals in Cleveland, Ohio, require that all contracts of more than $20,000 must include at least one local or MWBE in the bidding process.[226] Another example is MD Anderson Cancer Center, which stipulates that all contracts under $100,000 are required to have a certain number of diverse vendors per bid.[227] |
| 2.5 | Work with current GPOs to gain access to a wide network of diverse suppliers. Consider future opportunities to work with GPOs to increase opportunities for local small and diverse vendors. For example, Parkland Health and Hospital System in Dallas, TX, worked with their GPO, Vizient, to add a regional printing company to Vizient's contract portfolio, expanding the business opportunities for that company.[228] |

**Recommendation III: Identify Local Business Capacity to Meet "Movable Spend"**

| Steps | Description |
|---|---|
| 3.1 | Partner with city agencies, small business support organizations, and other anchor institutions to understand current business landscape, opportunity areas and business challenges. |
| 3.2 | Create a database of vetted diverse businesses from target communities that can serve as a guide for purchasing decision makers who wish to support UCSF's Anchor Initiative but do not have the resources or time to evaluate businesses on their own. This database may be built from UCSF Campus Supply Chain Management's "SupplierIO" program. |
| 3.3 | Solicit small business referrals from other Bay Area anchor institutions such as Kaiser Permanente. |

**Recommendation IV: Connect with Local Businesses and Support Capacity-Building Activities**

| Steps | Description |
|---|---|
| 4.1 | Explore potential partnerships and opportunities for mentor-protégé programs designed to prepare local small businesses to meet the demand of a large hospital system. Some examples include:<br>▪ The MD Anderson Cancer Center in Houston, Texas has an in-house mentor-protégé program that connects large vendors to small, diverse businesses. The partnership allows small vendors to develop skills and to understand the health system's needs and culture.[229]<br>▪ The six-month paid internship program for licensed general contractors managed by Greenville Health System, a not-for-profit academic health care system in South Carolina, provides a good example. The program pairs a minority general contractor with an employee from the health system's construction team, and provides the minority contractor with experience and exposure to the health care field. After the internship, the minority contractor receives one or more bids equaling $1 million in projects.[230]<br>▪ The University of Chicago Medicine, an academic medical center, has a supplier mentorship program that connects strategic manufacturers with smaller minority vendors in order to offer better pricing.[231] |
| 4.2 | Participate in, or organize, outreach events for local small and diverse vendors to learn about UCSF's procurement culture and practices, connect with buyers and decision makers, and learn about upcoming contracting opportunities. For example, Saint Francis Care, an integrated health care delivery system in Connecticut, hosts an annual health care supplier diversity event to educate small and diverse businesses about how to do business within the health care field.[232] One possible opportunity is asking the UCSF Lab Manager Steering Committee to integrate diverse business outreach into its annual research vendor showcase. |
| 4.3 | Explore opportunities to pool demand for products and services produced by diverse and local small business. |

# *Promising Procurement Initiatives*

## San Francisco

### City and County of San Francisco Local Business Enterprise Ordinance

In 2015, to foster a strong and vibrant network of small and very small micro businesses in San Francisco, and to ensure that these businesses can compete for public contracts on a level playing field, the San Francisco Board of Supervisors adopted the Chapter 14B Local Business Enterprise (LBE) ordinance into the San Francisco Administrative Code.

The LBE ordinance does the following::[233]

1. Provides certification of micro, small and SBA LBEs in designated categories of work[234]
2. Sets LBE participation goals for covered contracts and monitor the solicitation and selection process
3. Provides informational workshops and technical assistance provided to bidders, primes, subs and City staff
4. Facilitates Bonding and Financial Assistance Program
5. Determines pre- and post-award compliance with Chapter 14B
6. Tracks and reports departmental LBE participation
7. Investigates, mediates and resolves certification and compliance complaints, including prompt payment issues

According to the Contract Monitoring Division's FY 2016-17 Annual Report, there were a total of 1,143 certified small and micro LBEs, of which 35.9 percent are minority-owned and 25.6 percent are women-owned.[235] These LBEs are categorized into five service categories: (1) general and special construction contractors, (2) trucking and hauling contractors, (3) goods, materials and equipment suppliers, (4) general service providers, and (5) architects, engineers and professional services. See Table 13 for a breakdown of service vendors by categories. The neighborhoods with the most LBE businesses are Bayview–Hunters Point, North Beach/Chinatown, Potrero Hill/ Mission Bay, Central/South of Market Area and Downtown/Financial District, with 312, 138, 133, 127, and 115 businesses, respectively.

**Table 13: Number of Vendors in Each Service Category**

| Service Category | Number of Vendors |
|---|---|
| Architects, Engineers and Professional Services | 565 |
| General Service Providers | 362 |
| General and Special Construction Contractors | 299 |
| Goods, Materials and Equipment Supplier | 119 |
| Trucking and Hauling Contractors | 48 |

In FY 2016-17, five city agencies awarded contracts to LBE businesses. These city agencies include San Francisco International Airport, the Port of San Francisco, the Department of Public Works, the Public Utilities Commission, and the Recreation and Parks Department. These agencies awarded 64 prime contracts and an unknown number of subcontracts to micro and small LBE businesses. These contracts represent a contract value of more than $210 million, accounting for the majority (59 percent) of contract value awarded overall.

## National

Tables 14 and 15 compare UCSF's current supply chain management policies and practices with promising practices for anchor institutions. Table 14 lists anchor institution policies for diverse and local small business spending and identifies whether or not these policies are currently being carried out at UCSF. Table 15 lists quantitative procurement metrics for evaluating UCSF's effectiveness as an anchor institution and identifies whether or not these metrics are currently being tracked by UCSF.

**Table 14: Anchor Institution Promising Practices for Diverse, Local Spending**

| Policies and practices | Promising initiatives | Is this an official UCSF policy? |
|---|---|---|
| Set floor for percent spending with diverse local vendors (e.g., 80 percent spending with local and regional firms, 15 percent with minority-owned enterprises, 5 percent with woman-owned enterprises) | University Hospitals, Cleveland, OH<br>MD Anderson Cancer Center, Houston, TX<br>Parkland Health and Hospital System, Dallas, TX<br>Charleston Area Medical Center, Charleston, WV<br>University of Pennsylvania, Philadelphia, PA | N |
| Contracts and quotes must include minimum number of local diverse business in the bidding process | University Hospitals, Cleveland, OH<br>MD Anderson Cancer Center, Houston, TX<br>Parkland Health and Hospital System, Dallas, TX<br>Chicago Anchors for a Strong Economy, Chicago, IL | N |
| Require contractors to subcontract with local diverse businesses from target zip codes | University Hospitals, Cleveland, OH<br>MD Anderson Cancer Center, Houston, TX | N |
| Create standards for environmental impact of products and services purchased and/or set floor for percent spending with "green" firms | University Hospitals, Cleveland, OH | Y |
| Create full-time positions or departments, embedded within supply chain department, dedicated to tracking and promoting supplier diversity | MD Anderson Cancer Center, Houston, TX<br>Parkland Health and Hospital System, Dallas, TX | N |

| | | |
|---|---|---|
| Provide technical assistance and mentorship to local diverse business owners, so they can learn how to work with and meet the needs of large health system clients | MD Anderson Cancer Center, Houston, TX<br>Parkland Health and Hospital System, Dallas, TX<br>Charleston Area Medical Center, Charleston, WV<br>Chicago Anchors for a Strong Economy, Chicago, IL<br>University of Pennsylvania, Philadelphia, PA | N |
| Create forums for local diverse business owners to interface with purchasing decision makers | MD Anderson Cancer Center, Houston, TX<br>Parkland Health and Hospital System, Dallas, TX<br>Chicago Anchors for a Strong Economy, Chicago, IL | N |
| Break up large projects into components so small companies can afford bonding and insurance requirements | Parkland Health and Hospital System, Dallas, TX | N |
| Collaborate with other local anchor institutions to pool demand for local and diverse business products and services | Parkland Health and Hospital System, Dallas, TX<br>Charleston Area Medical Center, Charleston, WV<br>Chicago Anchors for a Strong Economy, Chicago, IL<br>University of Pennsylvania, Philadelphia, PA | N |

**Table 15: Quantitative Procurement Metrics for Assessing Anchor Institution Impact**

| Category | Data | Does UCSF collect this data? |
|---|---|---|
| Spending | Spend with vendors within defined region and/or state | Y |
| | Spend with vendors within target low-income/underserved zip codes or neighborhoods | Y |
| | Spend with minority- or woman-owned businesses | Y |
| | Spend with other diverse supplier categories, including historically underutilized businesses (HUB), veteran-owned businesses, LGBTQ-owned businesses, etc. | Y |
| | Spend with employee-owned businesses and worker-owned cooperatives or other inclusive business structures | N |
| Contracts/bids | Number and total value of local, diverse vendors with UCSF contracts | Y |
| | Total bids or quotes from suppliers in target low-income/underserved zip codes or neighborhoods | N |
| | Total bids or quotes from minority- or woman-owned businesses | N |

| | | |
|---|---|---|
| Vendor business practices | Vendor wages and employee benefits | N |
| | Vendor growth over time (number of employees, size of business, etc.) | N |
| | Number of local employees employed by direct vendors/contractors | N |
| | Number of local employees who come from under-resourced populations | N |
| Environmental impacts | Data on environmental impact of purchases, including transportation miles, chemicals used, waste disposal, water use, etc. | N |
| Tracking impact of spending in target zip codes | Number of locally owned businesses in the targeted geographic area | N |
| | Number of minority- or woman-owned businesses in the target geography | N |
| | Number of employee-owned businesses in the targeted geographic area | N |
| | Unemployment rate in the target geography | N |
| | Number of living wage jobs created from increased business with UCSF in targeted geographic area | N |
| | Number of residents with access to health insurance benefits within the targeted geographic area | N |

SECTION IV

# COMMUNITY INVESTMENT

# *Introduction*

Community investment is the process of investing financial resources with three defining elements:

1. A focus on under-resourced communities or marginalized areas that conventional market activity does not reach (in practice, low-income neighborhoods, communities of color, and underserved geographic regions such as rural communities);
2. A focus on enabling the delivery of explicit social benefits (e.g., economic development, affordable housing, community health improvement, provision of needed goods and services at affordable rates, etc.); and
3. A financial product available for investment that can be managed in terms of risk and return (including social and environmental returns).[236]

Anchor institutions invest because they recognize the importance of partnerships in addressing the social determinants of health in their geographic community. Community investment allows an anchor institution to direct a small portion of its investable reserves locally, to address structural resource gaps that negatively impact the social determinants of health, while simultaneously generating a positive financial return on investment for the institution. The community benefits, and expected return on investment, created by these investments will vary depending upon asset class, geographical scope and community need. Community investment opportunities range from something as simple as holding cash deposits in local community-owned banks, credit unions and community development financial institutions (CDFIs), to providing direct equity or debt investments into companies or funds that are aligned with the same social goals and principles as the institution.[237]

The following asset classes can be utilized as part of a community investment strategy: [238,239]

- **Cash and cash equivalents:** deposits in local community development banks and credit unions. Leverage the institution's sizable balance sheets to expand access to capital in under-resourced communities through deposits that finance loans to community members and help local businesses expand.
- **Fixed income:** geographically targeted private and public debt investments that generate income at an established, fixed rate. Provide capital to financial intermediaries that invest responsibly, and offer debt capital to borrowers that address social, economic, and environmental needs in under-resourced communities that the institution serves.
- **Private equity and venture capital:** equity investments in local private enterprises with positive community benefits. Seed, scale and retain locally owned businesses through private equity and venture capital investments. Help convert businesses to employee ownership.

- **Real assets:** investments in local infrastructure, real estate and commodities to improve the structural determinants of health that affect health and well-being. These investments can help maintain affordability of residential and commercial properties, support community renewable energy properties, protect farmland and much more.

Across the country, numerous health care systems have implemented transformative community investment programs to improve the social determinants of health in local communities. These programs help address community-identified needs that the institution cannot solve on its own (e.g., affordable housing, small business loans, reliable banking, etc.), and provide a positive financial return on investment.

Community investment programs are typically funded by setting aside a small portion – most commonly 1 percent to 5 percent – of the institution's investable reserves (i.e., a long-term reserve or savings fund, an operating investment portfolio, or a portion of the institution's endowment.).[240] The fund is then managed by a small dedicated team (often only two full-time dedicated employees, or staff from larger departments devoting a portion of their time), working closely with the institution's legal, treasury and finance departments, and sometimes the relevant "community benefits" office.[241] The team is responsible for reviewing requests, helping with due diligence, tracking payment, meeting with borrowers, and examining financials annually.[242]

Investments are most commonly in the form of low-interest loans to community development financial institutions (CDFIs) and community nonprofits, and cash deposits in local financial institutions, with the requirement that these funds are spent within the institution's service or focus area. In "Place-based Investing," a 2017 report produced by the Democracy Collaborative, the authors reviewed a sample of existing community investment programs, and found that all programs generated a positive financial return (typically between 2 percent and 3 percent), and significant social benefits that are harder to quantify (e.g., increased affordable housing production, small business support and investments in community facilities).[243] A sample of promising community investment programs are highlighted here:[244]

- **Dignity Health's Community Investment Fund** provides below-market interest rate loans and other investments to local CDFIs, credit unions, and nonprofit organizations. The institution is able to allocate, per current policy, up to 5 percent of the institution's funded depreciation account to the program; current allocation is $140 million in 2018. A funded depreciation account is made up of funds set aside in a safe investment by the institution in order to cover future capital expenses. The program is managed by two full-time staff who work closely with the institution's legal, treasury, and finance departments. Interest rates on loans typically range from 0 percent to 5 percent, and the rate of return at time of this publication was about 3.2 percent. Over the life of the program, Dignity has invested more than $200 million in loans and equity, including $6.5 million to the San Francisco Housing Accelerator Fund, a nonprofit financial intermediary that pools capital from public, private and philanthropic sources to accelerate the preservation and production of affordable housing in San Francisco (the fund is discussed further later in this section).[245]
- **Bon Secours Health System** aims to invest up to 5 percent of its long-term reserve fund (LRF) into local CDFIs and other nonprofit organizations serving low- and moderate-income communities. In 2018 the fund amounted to more than $26 million, or about 2.5 percent of the institution's LRF, and was considered a substitute for fixed-income investments.[246] The program

## How UCSF can benefit from community investment

- Generate social and environmental returns on investments, in addition to financial returns
- Create new employment opportunities for San Francisco's under-resourced populations through small business support.
- Address vital resource gaps and structural barriers that are limiting the impact of community and UCSF initiatives
- Improve patient and provider satisfaction[315]
- Meet social support funding requirements, and achieve cost savings from reduced hospital admissions and emergency room use[316]
- Support and sustain the growing movement of Bay Area place-based/impact investment organizations addressing the urgent social and structural determinants of health
- Protect public health and the environment by reducing the institution's environmental impacts

is managed by two full-time staff from the corporate office who work closely with the institution's treasury, legal, and community benefits departments. The target size of the loans ranged between $100 thousand and $200 thousand in the early stages of the program, and has increased to between $400 thousand and $500 thousand. The program seeks a return on loans of 0 percent to 3 percent; the actual return historically has been around 2.25 percent.

- **St Joseph Health's Community Investment Fund** provides loans, deposits and other support to CDFIs and nonprofit organizations focused on affordable housing, economic development, social services, food banks, job expansion and education within the institution's service area. The institution allocates to the fund whichever is greater: 2 percent of the long-term reserves sub-account or $150 million. The fund is managed by the vice president of Community Partnerships, and staff from her team who assist with preliminary results, due diligence, payment tracking, meeting with borrowers, and examining financials annually. Potential grantees are referred to fund managers and the vice president of Cash and Investments. No staff member spends more than 10 percent of their time administering the fund. One-third of investments are in the form of low-interest loans to CDFIs, and the remainder are direct loans to nonprofits, with a requirement that borrowers secure these loans with collateral. The program generates a 2 percent return annually.

Another opportunity for community investment is through an institution's endowment investment portfolio. An institution's endowment is responsible for managing and growing the value of donor gifts and contributions to the institution, in order to provide an ongoing, dependable funding source for the programs or purposes chosen at the time of the gift. Money contributed to an endowed fund is invested in a portfolio of public and private investments with the expectation of a high return and growth of principal over time.[247] However, due to the specific gift requirements, and the responsibility to acquire a maximum yield, endowment funds have not generally been made available for community investments.[248] Community investing activity by university endowments tends to remain confined to single-issue negative screening of investments, and disinvestment from goods and companies perceived as having a harmful impact.[249] Hospitals across the country have begun to explore opportunities to leverage their endowment fund or utilize profits generated from endowment investments for community investments.

One promising example is the Population Health Innovation Fund at Dartmouth-Hitchcock, an academic health system in New Hampshire with a $1.8 billion endowment portfolio. In 2016, the institution committed to reinvesting 30 percent of annual investment portfolio profits that exceed the investment return goal (4.5 percent) towards the newly created fund.[250] By 2018, this fund had

grown to more than $14.5 million, used to provide grants for local population health initiatives and partnerships.[251] The institution's chief financial officer, who oversees the program, intends to supplement the program with other permanent sources of revenue in order to make the funding more predictable.[252] This program can serve as a model for seeding a community investment fund.

# *UCSF's Community Investment Landscape*

The following section provides a landscape overview of existing programs, policies and practices at UCSF that will be relevant as the institution explores a potential community investment strategy. Unlike the workforce development and procurement sections, this section does not include a SWOT analysis of UCSF's community investment strategy, since, as outlined earlier, the strategy has not yet been developed.

## UCSF Foundation

Currently, UCSF has a total endowment valued at more than $2.7 billion.[253] The endowment is divided into two pools, one managed by the UCSF Foundation and the other by the UC Regents General Endowment Pool.[254]

The UCSF Foundation pool is valued at more than $1.5 billion, and is managed by the nonprofit UCSF Foundation Investment Company, founded in 2015.[255,256] The UCSF Foundation, with UC Berkeley and UC Los Angeles, is one of three UC foundations whose assets are managed through an investment company.[257] The foundation's role is to fundraise for the university, and the foundation's investments are bound to steward gifts that are given to UCSF with very specific objectives and requirements.[258] In 2017, the foundation's endowed investment pool (EIP) return was 13.7 percent, and the total payout to the institution for the year was $55.4 million.[259] The three main purposes of gifts to the foundation are departmental support, campus improvement and research.[260]

## UC Regents General Endowment Pool

The UC Regents General Endowment Pool is currently worth $11.9 billion, of which more than $1.2 billion is from UCSF.[261] The General Endowment Pool accounts for approximately 10 percent of the total investment funds managed by the UC Office of the Chief Investment Officer of the Regents, valued at $118.3 billion.[262] In 2017, the General Endowment Pool provided a net annual return of 15.1 percent.[263] In 2016, the General Endowment Pool provided a total payout of $45.8 million to UCSF.[264] The vast majority of endowment assets go to student tuition and the operation of the UC campuses and medical colleges.[265]

## UCSF Investment Policies

The UCSF Foundation investment policy is aligned with policies set by the UC Office of the Chief Investment Officer (OCIO), which currently has a sustainable investment framework in

place for factoring "environmental sustainability, social responsibility, and governance (ESG) into the investment evaluation process as part of its overall risk assessment in its investments decision making."[266] Specifically, the framework includes considerations on matters such as climate change, inequality, human rights, food and water security, diversity and more.[267] However, there is currently no mandate for community investments. Other related policies and practices by OCIO include the following::

- OCIO implements a "negative screening" policy for companies perceived as having a harmful impact, including for-profit prisons, companies that derive the majority of their revenues from thermal coal or tar sands, gun manufacturers, the developers and operators of the Dakota Access Pipeline and tobacco companies..[268] In addition, OCIO engages managers on ESG issues, including investments in businesses such as payday lending that can be exploitive of low-income communities.[269]
- OCIO's investment portfolio also includes real estate investments in low-income community housing, and venture capital investments in local companies and businesses, especially those that are part of the UC community.
- OCIO also has an initiative to engage with publicly traded California-based companies over board and corporate diversity.[270]
- OCIO currently tracks its renewable energy investments and the carbon footprint of its equity portfolio. In addition, OCIO tracks its local venture capital investments, particularly venture capital investment programs focused on technology companies coming out of the UC system. One example of an equity investment made by OCIO is investment in the RISE Fund, a global impact fund led by private equity firm TPG.[271]

## UCSF Cushioning Activities

"Cushioning" is the term UCSF uses to describe the voluntary actions it takes to lessen any agreed-upon negative impacts of its physical development and presence on adjacent neighborhoods as outlined in the 2014 Long Range Development Plan, which was approved by the UC Regents.[272] These are actions taken in addition to the building design and environmental compliance processes the University takes when developing in an area. An equivalent term used by the city and many other local institutions (such as the Public Utilities Commission and California Pacific Medical Center) is "community benefits."[273]

UCSF implemented Community Planning Principles that were developed by a community process and outlined in UCSF's 2014 Long Range Development Plan. The planning principles were designed to provide a framework for a dialogue between UCSF and the community to determine potential impacts on a neighborhood from UCSF's development and a process to address those impacts through neighborhood improvements and other actions. As a result of a community task force process to discuss the potential impacts of UCSF projects in the Dogpatch neighborhood at 2130 Third Street and 590/600 Minnesota Street, UCSF agreed to cushion or offset potential impacts by investing $10.55 million in neighborhood improvements that were identified by community members as priority projects for the neighborhood."

UCSF is currently investing more than $10 million in cushioning activities in the Dogpatch and Potrero Hill neighborhoods.[274] Some of the cushioning activities include the following investments:

- An investment of $4.2 million in "The Hub project," which intends to convert the existing Third Street Police Station and adjoining hospital into a new meeting space for the neighborhood
- An investment of $5 million toward renovation of Esprit Park, which is owned and managed by the San Francisco Recreation and Park's Department
- Approximately $1.4 million for streetscape improvements in the Dogpatch neighborhood, including improvements to the 22nd Street stair connector, the 22nd Street Caltrain Station entrance and the traffic signal at 18th and Minnesota

## San Francisco Investment Opportunities

### Cash and Cash Equivalents Investment Opportunities

UCSF can direct a portion of its cash and cash equivalents into local community development banks, credit unions,and other financial intermediaries serving under-resourced communities in San Francisco, in order to support affordable housing development in the city and help build community wealth, capital access and lending capacity. This community investment strategy directly advances UCSF's goal of "partnering to advance health equity," at no additional risk to the institution, since interest rates at community banks and credit unions are comparable to traditional banks, and deposits are federally insured.[275] A 2012 study of national college and university endowments found that 48 of 277 schools are reported as currently investing in "community development financial institutions or community development loan funds," and an additional 31 schools are listed as considering commitments to community investment in the future."[276]

Building assets and wealth in under-resourced communities is critical to improving health outcomes and reducing inequality. There is a strong correlation between wealth and health. People with more wealth have lower mortality rates, lower rates of chronic diseases (such as heart disease, diabetes, and cancer), improved mental health, better ability to function in daily life, and lower rates of smoking, obesity, and excessive alcohol use.[277] People with greater wealth are more likely to take medications as prescribed and to use services that require out-of-pocket expenses.[278] Family wealth impacts the health of children and adolescents; children from wealthier families tend to have lower obesity rates, fewer markers of asthma, and better social-emotional development.[279]

One of the root causes of wealth disparity is low-income households and individuals being "unbanked" or "underbanked," terms used to refer to people who do not have a formal account or sufficient banking privileges with a financial institution. One in five San Franciscans are unbanked or underbanked.[280] Residents who are unbanked or underbanked often have to rely on wealth-stripping, fringe financial products and services to manage their money, such as check cashing companies, pawnshops and payday lenders.[281] Commonly referred to as "predatory lenders," these businesses charge high fees and hamper families' ability to build long-term, sustainable asset wealth. Credit unions, community banks and other community financial institutions lend more frequently and responsibly within under-resourced communities, and depositing UCSF's cash assets into these institutions can increase the community lending capacity.

## San Francisco Office of the Treasurer and Tax Collector's "Safe, Sound and Local" Program

The Office of the Treasurer & Tax Collector (Treasurer's Office) is responsible for the banking and investment activities of the City and County of San Francisco. The Investment Division of the Treasurer's Office is responsible for managing and investing the city and county's funds in a manner that will provide (1) preservation of capital, (2) liquidity to meet the daily cash flow demands of the city, (3) investment return while conforming to all state and local statues governing the investment of public funds, and 4) social responsibility.[282] As of April 2018, the county's pooled investment fund totaled more than $10 billion.[283]

In November 2017, the office adopted the "Safe, Sound and Local" program, which sets aside $80 million of the county's pooled investment fund for investments in banks, credit unions and community development financial institutions (CDFIs) located in San Francisco and backed by letters of credit issued by the Federal Home Loan Bank of San Francisco (FHLBank San Francisco).[284] Modeled after the Time Deposit program of the California State Treasurer's Office, the program ensures that local financial institutions receive substantial deposits through a stable source of funding. These deposits can then be reinvested into the local communities that the institutions serve, in the form of home mortgages, commercial real estate loans, small business loans and more.[285] The program helps empower community lenders and borrowers, while providing a competitive yield to the city and county. Furthermore, as the credit is backed by the FHLBank San Francisco and accounts for less than 1 percent of the investment portfolio, there is minimal risk.

In addition to the "Safe, Sound and Local" program, the Treasurer's Office investment policy has explicit goals around "social responsibility" (point 13.0), "social and environmental concerns" (13.1), and "community investments" (13.2).[286] The Treasurer's Office is exploring the feasibility of opening a public bank in San Francisco, which could potentially pursue the following five community goals: (1) affordable housing, (2) small business lending, (3) infrastructure improvement, (4) assistance to unbanked and underbanked individuals, and (5) cannabis.[287]

### Fixed Income Investment Opportunities

UCSF can provide geographically targeted private and public debt investments to CDFIs and other nonprofit financial intermediaries that help improve the social determinants of health and provide a positive financial return to investors. By investing in these intermediaries, UCSF can address the social determinants of health by partnering to build more affordable housing, support small business and develop crucial community facilities in under-resourced communities. Some promising San Francisco intermediaries are reviewed here:

## QB3 Incubator

One example of current private equity and venture capital investments through the UCSF Foundation are investments made into QB3. QB3 is the University of California's hub for innovation and entrepreneurship in the life sciences, with two seed-stage venture capital firms and five incubators, one of which is in Mission Bay.[295] The UCSF Foundation currently invests in QB3 through gifts from philanthropic partners made to the Foundation for that purpose.[296] As of 2014, QB3 supported 411 early-stage companies that were employing 1,728 people.[297] Though the jobs created through QB3 are more likely to be high-skilled jobs that may not reach the under-resourced populations targeted by a community investment strategy, investments in QB3 can serve as a model for future investments in businesses that are owned by or employ under-resourced populations in San Francisco.

- **The San Francisco Housing Accelerator Fund** is a nonprofit financial intermediary that pools capital from public, private and philanthropic sources to accelerate the preservation and production of affordable housing in San Francisco.[288] Current investors include Citi Community Development, the Housing Division of the San Francisco Mayor's Office of Housing and Community Development, The San Francisco Foundation, and the Dignity Health Foundation (which contributed $6.5 million to the Fund).[289, 290] The Fund has already financed six affordable housing projects in the city and has a goal of preserving and building more than 1,500 affordable housing units in its first five years.[291]

- **Opportunity Fund** is a CDFI headquartered in San Jose, with an office in San Francisco, that provides resources to finance small and micro businesses, and community facilities, in low-income communities throughout California and the nation.[292] In addition to small business support (Opportunity Fund invested more than $65 million in small businesses in 2017), Opportunity Fund provided more than $30 million to three high-impact community real estate projects to support healthy local communities.[293] These projects include (1) the Coachella Valley Rescue Mission, an emergency 250-bed shelter serving the temporary and chronic homeless populations; (2) the Dream Center, one of the largest non-governmental human service providers in Los Angeles, providing services such as a food bank, mobile medical clinics, long-term transitional life-building program for families, job training programs and more; and (3) the David Brower Center in Berkeley, one of the first LEED Platinum-certified commercial complexes on the West Coast, providing below-market-rate rental office space for nonprofit organizations.[294]

### Private Equity and Venture Capital Opportunities

UCSF can make private equity and venture capital investments to help seed, scale and retain local businesses that are owned by or employ under-resourced populations. UCSF can choose to invest directly in companies, or through one of the many growing impact investment funds in the Bay Area.

Making private equity and venture capital investments through intermediary impact investment funds is a common strategy for community investment programs at other institutions and can also be a viable strategy for UCSF. These types of funds raise capital from philanthropic interests, high net worth individuals, and pension funds, and take ownership stakes in high-growth companies that are not publicly traded and can provide an attractive return potential, albeit at a higher risk and with less liquidity.[298] A recent survey of 53 impact investing private equity funds conducted by the Wharton Social Impact Initiative found that, on average, investments made by these companies yielded a 13 percent return, nearly identical to the standard investment benchmarks.[299] A 2016 global survey of impact investors found that nearly 75 percent invest via intermediary funds.[300] The social impact targets of these funds can generally be grouped into three areas:[301]

1. Creating social value through new products or services
2. Generating new employment opportunities for disadvantaged populations
3. Investing in specific geographies

The Bay Area is home to a number of impact investment funds that have a proven track record of success in growing companies that are owned by or employ under-resourced populations. The following are some promising examples:

- **The Bay Area Family of Funds** is a regional effort developed by the Bay Area Council to attract private capital into low- and moderate-income neighborhoods through "double bottom line" (DBL) investing.[302] DBL investing has two components: (1) risk-adjusted market rates of financial return for its investors, and (2) significant economic social and environmental returns for the communities.[303] The initiative has raised more than $215 million through four separate funds: the Bay Area Smart Growth Funds I and II, the Bay Area Equity Fund and the California Environmental Redevelopment Fund. These funds have had significant impact on promoting economic prosperity in under-resourced neighborhoods throughout the region. For example, the Bay Area Equity Fund invested $75 million of capital across 18 portfolio companies – including Tesla Motors, SolarCity, Revolution Foods, and more – in the Bay Area's low- to moderate-income neighborhoods. This investment has resulted in a 24.4 percent internal rate of return and the creation of approximately 15,000 jobs, 2,218 of which were entry-level positions in the Bay Area.[304]
- **Better Ventures, LLC** is an impact investment fund based in Oakland that uses private equity to fund and support early-stage technology companies that support the three themes of opportunity, health and sustainability.[305] The organization is a certified B-Corp with 100 percent of its assets under management targeted toward impact. Better Ventures invests between $100,000 and $250,000 in companies at the seed stage.[306] One of the companies funded by Better Ventures is The Town Kitchen, a catering company based in Oakland that uses locally sourced ingredients and provides training and fair-wage employment opportunities for transitional age youth (ages 15 to 25), almost half of whom are foster or re-entry youth.[307]
- **Pacific Community Ventures (PCV)** is a nonprofit social enterprise and CDFI headquartered in San Francisco that provides capital and resources to high-growth, consumer-facing California businesses that bring significant economic benefits to low- to moderate-income employees.[308] In 2016, the organization supported 379 small businesses across the country, 65 percent of which are located in or hire from low-income communities.[309] Investments by the organization helped to directly create or retain 2,359 jobs, with an average wage of $32/hour (for full-time workers) and $15/hour (for part-time).[310] The fund currently manages more than $60 million in assets.[311] One of

the success stories attributed to PCV is the Tadu Ethiopian Kitchen restaurant in Mission Bay, which obtained a $125,000 loan from PCV in 2017.[312]

# *Community Investment Recommendations*

The recommendations that follow are primarily drawn from the Hospitals Aligned for Healthy Communities Toolkit Series Place-based Investing 2017 Report.[313]

**Recommendation I: Assess Existing UCSF Investment Landscape**

| Steps | Description |
|---|---|
| 1.1 | Review current investment culture:<br>› What are the values and goals of your institution?<br>› How can investments support your institution's health promotion objectives?<br>› Are you currently invested in companies or financial instruments that create or reinforce health problems that your institution is working to address?<br>› Who can support and/or build momentum for place-based investment internally? |
| 1.2 | Review existing investments and investment portfolio:<br>› What is in the existing portfolio?<br>› Has the portfolio been inventoried to identify investments at cross-purposes with the mission of your institution?<br>› Has the portfolio been inventoried to identify existing place-based investments?<br>› Are there investment managers in your portfolio who can help you reallocate to place-based investments or establish new place-based investment products?<br>› Are there current investments that create or reinforce the health problems that UCSF is working to solve?<br>› What is the asset allocation and how can it be adjusted to incorporate a place-based investment carve-out?<br>› What is the desired annual rate of return for unrestricted assets?<br>› Does your institution have relationships with local community banks or credit unions?<br>› What opportunities exist for shifting deposits to additional local community banks and credit unions? |
| 1.3 | Review existing staff capacity and knowledge:<br>› What are your investment advisors' capabilities around sustainable, responsible and impact investing?<br>› To what extent is your investment staff educated and experienced in sustainable, responsible and impact investing?<br>› What are the capacities and offerings of your existing investment managers around place-based investing?<br>› What is the role of governance in setting or evaluating investment priorities or goals?<br>› To what extent is your board educated on place-based investing?<br>› Is there a dedicated place-based investment committee? |
| 1.4 | Review existing investment policies and governance structure<br>› What is the primary role of the investment portfolio in supporting health system operations?<br>› Are there environmental, social and Governance (ESG) criteria for the portfolio?<br>› Does the institution have policy for sustainable, responsible or impact investing?<br>› Do the institution's policies permit place-based investment allocations? |

**Recommendation II: Develop a UCSF Community Investment Strategy with Community Input**

| Steps | Description |
|---|---|
| 2.1 | Identify goals and motivations for pursing community investment. |
| 2.2 | Define key principles to achieving those goals, and the investment vehicles that are most suited to the goals. |
| 2.3 | Identify key institution champions and staff responsible for managing community investments. |
| 2.4 | Designate a percentage of assets within investment portfolio or investable reserves for community investments. |
| 2.5 | Designate funds for community investments from surplus returns from investment portfolio. |
| 2.6 | Create a community board composed of members from under-resourced populations that can provide guidance on community investments in high-need, high-poverty areas. |

**Recommendation III: Build Internal and External Relationships**

| Steps | Description |
|---|---|
| 3.1 | Foster working relationships between community outreach and investment staff. |
| 3.2 | Engage key nonprofit partners on their long-term plans and investment needs. |
| 3.3 | Join impact investment networks and engage in collaborative community investment initiatives. |
| 3.4 | Build a relationship with a financial intermediary, such as a community development financial institution (CDFI). |
| 3.5 | Connect investment advisor with training opportunities on sustainable, responsible, and impact investing. |
| 3.6 | Foster working relationships with community members from high-need, high-poverty areas. |

**Recommendation IV: Implement the UCSF Community Investment Strategy**

| Steps | Description |
|---|---|
| 4.1 | Allocate assets from investment portfolio for place-based investments. |
| 4.2 | Increase the asset allocation incrementally. |
| 4.3 | Make investments that complement community benefits and other anchor institution strategies. |
| 4.4 | Connect capacity building with direct lending. |
| 4.5 | Move cash and cash equivalent assets into local banks and credit unions. |
| 4.6 | Monitor and track impact. |

Source: Promising Community Investment Policies and Practices[314]

# National

## Table 16: National Best Policies and Practices for Community Investment

| Policies and practices | | Case studies | Does UCSF have this policy? |
|---|---|---|---|
| Allocate assets from investment portfolio for place-based investments | Designate a percentage of investible assets within investment portfolio for place-based investments | Secours Health System, Ashland, KY; Gundersen Health System, La Crosse, WI; St. Joseph Health; Trinity Health | N |
| | Increase the asset allocation incrementally over time | Bon Secours Health System | N |
| | Create a place-based investment asset allocation specifically to complement community benefit strategies | Trinity Health | N |
| | Fund place-based investment with surplus returns from investment portfolio | Dartmouth-Hitchcock Health, Lebanon, NH | N |
| | Contribute a fixed amount annually from investment portfolio | Mercy Health | N |
| | Ensure a minimum available amount | St. Joseph Health | N |
| | Create a place-based investment asset allocation to achieve a specific objective | Gundersen Health System | N |
| Identify place-based investment opportunities across asset classes | Cash and cash equivalents: deposits in local community development banks and credit unions | ProMedica, Bon Secours Health System, Trinity Health | N |
| | Fixed income: geographically targeted private and public debt investments | Dignity Health, Trinity Health, Dartmouth-Hitchcock Health, Mercy Health, St. Joseph Health | N |
| | Private equity and venture capital: equity investments in local private enterprises with positive community benefits | Dignity Health, Trinity Health | N |
| | Real assets: investments in local infrastructure, real estate and commodities with positive social and environmental impacts | Dignity Health | N |
| Dedicate a funding source | Create a formula for resourcing upstream community benefit strategies | Dartmouth-Hichcock Health | Y |
| Address community health needs by allocating discretionary operating dollars to sustainable solutions | Support inclusive, local community economic development | Dignity Health, Trinity Health, Dartmouth-Hitchcock Health, Mercy Health, St. Joseph Health | N |
| | Increase stable and affordable housing | Dignity Health | N |
| | Improve access to healthy and affordable food | ProMedica | ? |

# APPENDICES

# APPENDICES

I. Anchor Institution Assessment Steering Committee Members

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IV. San Francisco Economic and Health Disparities Data Tables

V. San Francisco Neighborhood Disparities Data Tables

VI. UCSF Workforce Development and Procurement Program Inventory

VII. UCSF Pathway Outreach Pipeline Programs

VIII. San Francisco Workforce Development Program Inventory

IX. Anchor Institution Program Metrics

X. Collective Impact Model Overview

XI. UCOP Sustainable Practices Policy Update

XII. San Francisco Small Business Support Organizations

XIII. Procurement Strategies in the Proposition 209 Era.

XIV. Establishing a Governance Structure

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## Appendix I. Anchor Institution Assessment Steering Committee Members and Interviewees

We appreciate and want to acknowledge all of the people who took time and energy out of their busy schedules to be a part of the Anchor Institution Assessment Steering Committee, and to participate in interviews and conversations for the assessment. Many also contributed in other ways, such as helping us track down important articles and information and suggesting additional key people to interview.

### Anchor Institution Assessment Steering Committee Members

- Howard Pinderhughes (Chair), Associate Professor & Chair, Department of Social and Behavioral Sciences, UCSF
- Marco Chavarin, Vice President, Community Development Citi
- Lisa Cisneros, Senior Director, Strategic Communications, University Relations
- Andrew Clark, Director of Strategic Sourcing, Supply Chain Management, UCSF

- Caroline Fichtenberg, Managing Director, Social Interventions Research & Evaluation Network (SIREN), UCSF
- Christine Gasparac, Senior Director, Community Relations, University Relations
- Kevin Grumbach, Professor and Chair, Family and Community Medicine, UCSF
- Olivia Herbert, Assistant Dean and Chief of Staff, School of Medicine Dean's Office, UCSF
- Melissa Jones, Executive Director, BARHI - Bay Area Regional Health Inequities Initiative
- Saidah Leatutufu, Economic Mobility Director at HOPE SF, Office of the Mayor
- Monique LeSarre, Executive Director, Rafiki Coalition for Health and Wellness
- Wylie Liu, Executive Director, UCSF Center for Community Engagement
- John Moon, District Manager, Community Development at Federal Reserve Bank of San Francisco
- David Odato, Associate Vice Chancellor, Human Resources Senior Vice President, HR, UCSF Health
- Alejandra Rincon, Assistant Vice-Chancellor and Chief of Staff, UCSF Office of Diversity and Outreach
- Ellie Rossiter, Initiative Officer and Partnership Director, HOPE SF, The San Francisco Foundation
- Victor Rubin, Vice President for Research at PolicyLink
- Joaquin Torres, Deputy Director, San Francisco Office of Economic and Workforce Development (Director as of August 2018)

## Appendix II. Interview Subjects

### UC-affiliated Staff and Faculty (33)

- Susie Ardeshir, Investment Director, UC Office of the Chief Investment Officer
- Kelly Anglim, HR Project Analyst, UCSF Health HR
- Teresa Costantinidis, Vice Chancellor and Chief Financial Officer, Chancellor's Cabinet
- Purba Chatterjee, Chief Operations Officer, Bixby-Affiliated Global Programs in Kenya
- Jeffrey Chiu, Vice President of Human Resources, UCSF Health
- Andrew Clark, Director of Strategic Sourcing, UCSF Supply Chain Management
- Michael Clune, Associate Vice Chancellor, UCSF Budget and Resource Management
- Jessica Driessler, Manager, Talent Acquisition, UCSF Human Resources
- Nancy Duranteau, Chief Learning Officer, UCSF Learning & Organization Development
- John Ellis, Associate Vice Chancellor and Controller, Controller's Office
- Caroline Fichtenberg, Managing Director, Social Interventions Research & Evaluation Network (SIREN)
- Paula Fleisher, Navigator of the Community Engagement and Health Policy Program, Clinical and Translational Science Institute and Center for Community Engagement
- Christine Gasparac, Senior Director of Community Relations, UCSF Community & Government Relations
- David Harkins, Chief Investment Officer, UCSF Foundation Investment Company
- Dan Henroid, Director, Department of Nutrition and Food Services, UCSF Health
- Gail Lee, Director, UCSF Office of Sustainability
- Stephanie Lopez, Senior Programs Manager, Small/Diverse Business, Sustainability & Bank Card, UCOP Procurement Services
- Paul Mulligan, Procurement Manager, UCSF Supply Chain Management
- Kiele Neas, UCSF Foundation Investment Company

- David Odato, Associate Vice Chancellor of Human Resources and Senior Vice President of Human Resources, UCSF Health
- Kevin Pattison, Vice President, UCSF Health Supply Chain Management
- Hanh Quach, Talent Analytics Lead, Human Resources, UCSF Health
- Joanie Rothstein, Managing Director, ZSFG Health Advocates Program and STEP UP Residency Program
- Janaye Roy Ruhl, Talent Acquisition Manager, UCSF Temporary Employment Program
- Lisa Schoonerman, Director, Online Education, UCSF Clinical & Translational Science Institute
- Jenny Schreiber, Assistant Vice Chancellor, UCSF Campus Human Resources
- Jennifer Seuferer, Education Specialist, UCSF Hellen Diller Family Comprehensive Cancer Center
- Clare Shinnerl, Associate Vice Chancellor, Campus Life Services
- Brian Smith, Associate Vice Chancellor, Research Infrastructure and Operations
- Greg Van Riper, Director, UCSF Health Supply Chain Management
- Roberto Vargas, Navigator of Community Engagement and Health Policy Program, Clinical and Translational Science Institute and Center for Community Engagement
- Rachel Wilard-Grace, Director, UCSF Center for Excellence in Primary Care
- James Wilkerson, Director, LARC

**Community Stakeholders (25)**

- Romulus Asenloo, Director, General Services Administration - Contract Monitoring Division, City and County of San Francisco
- Pablo Bravo, Vice President of Community Health, Dignity Health
- Marco Chavarin, Vice President of Community Development, Citi Community Development
- Lisa Countryman, Vice President of Grants and Programs Development, Jewish Vocational Services
- Katherine Daniels, Deputy Director of Workforce Division, San Francisco Office of Economic and Workforce Development
- Sheryl Davis, Executive Director, Human Rights Commission
- Will Douglas, Manager of Community Impact, Saint Francis Foundation
- Terri Feeley, Founder and Principal, Workforce Success
- David Gray, Acting Director of Community Benefits, San Francisco Public Utilities Commission
- Rucker Johnson, Associate Professor, UC Berkeley Goldman School of Public Policy
- Saidah Leatutufu, Economic Mobility Director, HOPE SF
- Jennifer Kiss, Vice President of Programs and TLHIP Director, Saint Francis Foundation
- Monique LeSarre, Executive Director, Rafiki Coalition
- Susan Ma, Business Development Manager for the Fashion and Production, Distribution, and Repair (PDR) Sectors, San Francisco Office of Economic and Workforce Development
- Vahram Massehiam, Senior Project Manager and Compliance Officer, California Pacific Medical Center
- Racheal Meiers, Project Lead, Kaiser Total Health
- Katie Parker, Research Associate, Democracy Collaborative
- Victor Phu, Former Junior Management Analyst for the African American Achievement and Leadership Program, SFUSD
- Ellie Rossiter, Initiative Officer and Partnership Director of HOPE SF, The San Francisco Foundation

- Victor Rubin, Vice President of Research, PolicyLink
- Lucia Sayre, Western Region Director, Health Care Without Harm
- Tajel Shah, Chief Assistant Treasurer, Treasurer & Tax Collector, City and County of San Francisco
- Emily Sladek, Senior Program Associate for Higher Education, Democracy Collaborative
- Stephanie Tang, Contract Compliance Officer, Contract Monitoring Division, City and County of San Francisco
- Joaquin Torres, Deputy Director of Invest in Neighborhoods Division, San Francisco Office of Economic and Workforce Development
- Jennifer Varano, Director of Community Health, Volunteer Services & Emergency Management, Saint Francis Memorial Hospital

# Appendix III. Endnotes

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# Appendix IV. San Francisco Economic and Health Disparities Data Tables

## IV. Economic And Health Disparities Data Tables

**Table 1. Economic Indicators for San Francisco County by Race/Ethnicity**

| *Indicator* | *African American* | *Pacific Islander* | *Hispanic/ Latino* | *Asian* | *White* |
|---|---|---|---|---|---|
| *Median Household Income [1]* | $ 28,603 | $ 50,147 | $ 62,153 | $ 75,013 | $ 111,704 |
| *Unemployment Rate [1]* | 16.1% | 15.2% | 7.3% | 6.5% | 4.8% |
| *Children Living Below Poverty Level [1]* | 47.3% | 35.7% | 14.4% | 11.2% | 3.0% |
| *Families Living Below Poverty Level [1]* | 24.3% | 29.1% | 10.6% | 8.7% | 2.2% |
| *People Living Below Poverty Level [1]* | 32.5% | 23.3% | 14.9% | 12.9% | 8.4% |
| *People 25+ with a Bachelor's Degree or Higher [1]* | 25.0% | 26.7% | 31.5% | 43.3% | 74.0% |
| *High School Graduation Rates [2]* | 71% | 87% | 75% | 95% | 84% |
| *% of Students Scored at Proficient or Above – Math [2]* | 12% | 23% | 21% | 70% | 69% |
| *% of Students Scored at Proficient or Above - English Language Arts [2]* | 18% | 25% | 28% | 69% | 76% |

Sources [1] ACS 2016 5-Year Estimate

[2] SFUSD "Facts at a Glance 2017":

**Table 2.** Health disparities in San Francisco by race/ethnicity

| *Indicator* | *African American* | *Hispanic/Latino* | *Asian/Pacific Islander* | *White* |
|---|---|---|---|---|
| *Late or no prenatal care [1]* | 34% | 23% | 10% | 6% |
| *Infant Mortality Rate (per 1000 live births) [1]* | 9.6 | 3.8 | 2.5 | 2.7 |
| *Prostate cancer incidence rate [2]* | 167 per 10,000 | 101 per 10,000 | 71 per 10,000 | 97 per 10,000 |
| *Preventable emergency room visit [3]* | 999 per 10,000 | 343 per 10,000 | 125 per 10,000 | 203 per 10,000 |
| *Emergency room visits due to diabetes [3]* | 80 per 10,000 | 25.6 per 10,000 | 8 per 10,000 | 10 per 10,000 |
| *Emergency room visits due to heart failure [3]* | 37 per 10,000 | 7 per 10,000 | 3 per 10,000 | 5 per 10,000 |
| *Emergency room visits due to hypertension [3]* | 57 per 10,000 | 20 per 10,000 | 11 per 10,000 | 10 per 10,000 |
| *Emergency room visits due to bacterial pneumonia [3]* | 59.4 | 22.3 | 10.1 | 17.4 |
| *Emergency room visits due to adult asthma [3]* | 156.7 | 32.5 | 10.4 | 18.9 |
| *Life expectancy (years)* | 71 | 82 | 85 | 81 |

Source:
[1] California Department of Public Health, 2013
[2] National Cancer Institute, 2010-2014
[3] California Office of Statewide Health Planning and Development, 2013-2015
[4] California Department of Public Health, Deaths Statistical Master File, 2010-2013

# V. San Francisco Economic and Health Disparities Data Tables

## V NEIGHBORHOOD DISPARITIES DATA

| SAN FRANCISCO HEALTH INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| *Source* | *Indicator* | *Bayview-Hunters Point (94124)* | *Castro, Noe Valley, Corona Heights* | *Chinatown (94108)* | *Excelsior, Ocean View, Ingleside (94112)* | *Forest Hill, Parkside (94116)* | *Haight (94117)* | *Inner Richmond (94118, 94129)* |
| California Office of Statewide Health Planning and Development 2013-2015 | Preventable Emergency Room Visits (per 10,000) | 616 | 162.9 | 150.6 | 249.1 | 133.9 | 215.9 | |
| California Health Interview Survey 2013-14 | Adults with Health Insurance (%) | 88.7 | 91.2 | NA | 88.2 | 91.4 | 90.2 | 91.1 |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Medical Supplies | 0.44% | 0.40% | 0.45% | 0.46% | 0.44% | 0.39% | 0.42% |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Prescription and Non-Prescription Drugs (%) | 6.91 | 5.14 | 6.49 | 7.31 | 6.69 | 4.85 | 5.69 |
| California Health Interview Survey 2013-2014 | Adults with Diabetes (per 10,000) | 7.4 | 2.4 | 7.6 | 6.7 | 3.3 | 4.6 | 5.4 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted Hospitalization Rate due to Diabetes (per 10,000) | 28.6 | 6.2 | 6.5 | 13.6 | 6.9 | 8.2 | 5.6 |
| California Office of Statewide Health Planning and Development 2013-2016 | Age-Adjusted ER Rate due to Diabetes (per 10,000) | 41.8 | 8.6 | 8.4 | 16.8 | 5.9 | 16.3 | 6 |
| California Health Interview Survey 2013-2014 | Percent of adults that report a BMI greater or equal to 30 | 17.8 | 9.9 | NA | 14.6 | 10.9 | 11.6 | 11.3 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to heart failure (per 10,000) | 20.4 | 4 | 2.7 | 6.2 | 3.7 | 5 | 3.5 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to hypertension (per 10,000) | 40.7 | 18 | 7.3 | 16 | 8.6 | 11.7 | 7.4 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to bacterial pneumonia (per 10,000) | 40.7 | 17.6 | 11.4 | 17.8 | 11.6 | 16 | 10.7 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted ER Rate due to Adult Asthma (per 10,000) | 80 | 16.3 | 10.7 | 23.8 | 13.3 | 21.8 | 10.2 |

| SAN FRANCISCO ECONOMIC INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Source | *Indicator* | *Bayview-Hunters Point (94124)* | *Castro, Noe Valley, Corona Heights* | *Chinatown (94108)* | *Excelsior, Ocean View, Ingleside (94112)* | *Forest Hill, Parkside (94116)* | *Haight (94117)* | *Inner Richmond (94118, 94129)* |
| American Community Survey 2012-2016 | Households with cash public assistance income (%) | 5.3 | 0.7 | 3 | 3.4 | 1.8 | 2.1 | 1.8 |
| American Community Survey 2012-2016 | Renters spending 30% or more of household income on rent (%) | 57.7 | 27.5 | 48.6 | 56.9 | 51 | 31.4 | 41.2 |
| American Community Survey 2012-2016 | Per capita income | $ 24,372 | $ 93,357 | $ 47,611 | $ 29,827 | $ 48,311 | $ 71,446 | $ 63,487 |
| American Community Survey 2012-2016 | Children living below poverty level (%) | 32 | 1.8 | 26.9 | 6.4 | 9.2 | 1.5 | 9.6 |
| American Community Survey 2012-2016 | Families living below poverty level | 18.9 | 2 | 20.2 | 5.9 | 4.3 | 1 | 4.8 |
| American Community Survey 2012-2016 | People living below poverty level | 20.4 | 6.1 | 21.7 | 9.4 | 9.7 | 9.4 | 10.8 |
| American Community Survey 2012-2016 | Children living in single-Parent Households | 53.7 | 14.3 | 25.6 | 23.8 | 13.8 | 20.3 | 12.2 |
| American Community Survey 2012-2016 | People 25+ with a bachelor's degree or higher | 24.3 | 77.4 | 43.8 | 29.3 | 47.5 | 75.6 | 65.9 |

| SAN FRANCISCO ECONOMIC INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Source | *Indicator* | *Lake Merced, Merced Manor, Lake Shore (94132)* | *Marina, Cow Hollow (94123)* | *Mission, Bernal Heights (94110)* | *Nob Hill, Russian Hill, Polk (94109)* | *North Beach, Telegraph Hill,* | *Outer Richmond, Sea Cliff (94121)* | *Potrero Hill, Mission Bay, Treasure Island (94105, 94107,* |
| American Community Survey 2012-2016 | Households with cash public assistance income (%) | 1.2 | 0.2 | 2.8 | 3 | 2.4 | 1.1 | 2.9 |
| American Community Survey 2012-2016 | Renters spending 30% or more of household income on rent (%) | 65.3 | 27 | 38.3 | 43.2 | 45.4 | 48.3 | 33.4 |
| American Community Survey 2012-2016 | Per capita income | $ 31,934 | $ 100,009 | $ 54,412 | $ 69,520 | $ 50,806 | $ 48,135 | $ 86,388 |
| American Community Survey 2012-2016 | Children living below poverty level (%) | 12.3 | 7.6 | 14.7 | 6.4 | 18.8 | 5.7 | 14.7 |
| American Community Survey 2012-2016 | Families living below poverty level | 9.6 | 2.8 | 7.9 | 4.5 | 15 | 6 | 6.7 |
| American Community Survey 2012-2016 | People living below poverty level | 21.2 | 5.1 | 12.1 | 13.5 | 18.8 | 10.5 | 13.3 |
| American Community Survey 2012-2016 | Children living in single-Parent Households | 30.1 | 16.3 | 29.2 | 27.5 | 17.8 | 18.7 | 29.6 |
| American Community Survey 2012-2016 | People 25+ with a bachelor's degree or higher | 49.2 | 82.5 | 53.8 | 62.9 | 47.7 | 53.1 | 71.1 |

| SAN FRANCISCO HEALTH INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Source | *Indicator* | *Lake Merced, Merced Manor, Lake Shore (94132)* | *Marina, Cow Hollow (94123)* | *Mission, Bernal Heights (94110)* | *Nob Hill, Russian Hill, Polk (94109)* | *North Beach, Telegraph Hill,* | *Outer Richmond, Sea Cliff (94121)* | *Potrero Hill, Mission Bay, Treasure Island (94105, 94107,* |
| California Office of Statewide Health Planning and Development 2013-2015 | Preventable Emergency Room Visits (per 10,000) | 212.5 | 134 | 277.8 | 246 | 181.1 | 161.5 | 227 |
| California Health Interview Survey 2013-14 | Adults with Health Insurance (%) | 90.5 | 91.8 | 89.6 | NA | NA | 90.9 | 90.1 |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Medical Supplies | 0.41% | 0.40% | 0.42% | 0.42% | 0.45% | 0.44% | 0.39% |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Prescription and Non-Prescription Drugs (%) | 6.07 | 4.75 | 5.55 | 5.45 | 6.68 | 6.6 | 4.65 |
| California Health Interview Survey 2013-2014 | Adults with Diabetes (per 10,000) | 2.1 | 5.6 | 4.9 | 8.9 | 5.4 | 4.7 | 8.4 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted Hospitalization Rate due to Diabetes (per 10,000) | 9.3 | 3.6 | 16.8 | 8.4 | 6.7 | 5 | 11.1 |
| California Office of Statewide Health Planning and Development 2013-2016 | Age-Adjusted ER Rate due to Diabetes (per 10,000) | 15.3 | 5.1 | 24.5 | 11 | 5.3 | 6.6 | 13.6 |
| California Health Interview Survey 2013-2014 | Percent of adults that report a BMI greater or equal to 30 | 15.9 | 8.4 | 15.9 | 12 | 10.9 | 10.9 | 11.5 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to heart failure (per 10,000) | 4 | 3 | 6.9 | 7 | 3.8 | 4.3 | 5 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to hypertension (per 10,000) | 15.3 | 6.9 | 16.9 | 15.1 | 8.1 | 9.5 | 14.7 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to bacterial pneumonia (per 10,000) | 12.8 | 8.6 | 24.4 | 18.7 | 12.1 | 12.4 | 15.7 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted ER Rate due to Adult Asthma (per 10,000) | 20.5 | 13.6 | 31.9 | 23.3 | 20.9 | 12 | 24.7 |

| SAN FRANCISCO HEALTH INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Source | *Indicator* | *South of Market (94103, 94104)* | *Sunset (94122)* | *Tenderloin, Hayes Valley, North of* | *Twin Peaks, Diamond Heights,* | *Visitacion Valley, Portola (94134)* | *West Portal, St Francis Wood, Miraloma* | *Western Addition, Japantown, Pacific* |
| California Office of Statewide Health Planning and Development 2013-2015 | Preventable Emergency Room Visits (per 10,000) | 531.4 | 132.7 | 570.8 | 167.5 | 297.6 | 151.8 | 292.8 |
| California Health Interview Survey 2013-14 | Adults with Health Insurance (%) | NA | 90.9 | NA | 91.8 | 89.1 | NA | 91 |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Medical Supplies | 0.41% | 0.43% | 0.40% | 0.41% | 0.47% | 0.43% | 0.41% |
| Claritas Consumer Buying Power 2017 | Consumer Expenditures: Prescription and Non-Prescription Drugs (%) | 5.32 | 6.18 | 5.39 | 5.67 | 7.43 | 6.35 | 5.42 |
| California Health Interview Survey 2013-2014 | Adults with Diabetes (per 10,000) | 5.2 | 6.1 | 4 | 8.2 | 4.4 | 8.4 | 2.8 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted Hospitalization Rate due to Diabetes (per 10,000) | 23.5 | 5.9 | 22.2 | 5.7 | 17.1 | 6.5 | 11.7 |
| California Office of Statewide Health Planning and Development 2013-2016 | Age-Adjusted ER Rate due to Diabetes (per 10,000) | 39 | 7.6 | 39.8 | 8.6 | 19.5 | 7.5 | 22.6 |
| California Health Interview Survey 2013-2014 | Percent of adults that report a BMI greater or equal to 30 | NA | 11.1 | 13.7 | 11.7 | 14 | NA | 12.1 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to heart failure (per 10,000) | 16.8 | 3.8 | 20.3 | 4.5 | 7.5 | 4.4 | 8 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to hypertension (per 10,000) | 28.3 | 11.5 | 27.8 | 10.6 | 13.7 | 7.4 | 18.7 |
| California Office of Statewide Health Planning and Development 2013-2015 | Emergency room visits due to bacterial pneumonia (per 10,000) | 40.7 | 12.5 | 40.9 | 13 | 20.4 | 12.3 | 20.2 |
| California Office of Statewide Health Planning and Development 2013-2015 | Age-Adjusted ER Rate due to Adult Asthma (per 10,000) | 67.2 | 10.5 | 82.4 | 14.9 | 29.2 | 10.6 | 31.5 |

| SAN FRANCISCO ECONOMIC INDICATORS (BY ZIP CODE) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Source | *Indicator* | *South of Market (94103, 94104)* | *Sunset (94122)* | *Tenderloin, Hayes Valley, North of* | *Twin Peaks, Diamond Heights,* | *Visitacion Valley, Portola (94134)* | *West Portal, St Francis Wood, Miraloma* | *Western Addition, Japantown, Pacific* |
| American Community Survey 2012-2016 | Households with cash public assistance income (%) | 7 | 0.9 | 4.7 | 0.8 | 3.9 | 1.5 | 1.9 |
| American Community Survey 2012-2016 | Renters spending 30% or more of household income on rent (%) | 46.2 | 39.8 | 54.1 | 37.4 | 56.3 | 38.8 | 38.5 |
| American Community Survey 2012-2016 | Per capita income | $ 53,480 | $ 48,951 | $ 38,769 | $ 71,592 | $ 26,103 | $ 70,001 | $ 75,968 |
| American Community Survey 2012-2016 | Children living below poverty level (%) | 23.1 | 6.4 | 16.4 | 4.3 | 16 | 2.1 | 12 |
| American Community Survey 2012-2016 | Families living below poverty level | 11.5 | 4.1 | 11.9 | 4.7 | 9.6 | 1.5 | 8.9 |
| American Community Survey 2012-2016 | People living below poverty level | 23.5 | 9.2 | 25 | 6.1 | 11.8 | 6.1 | 13.1 |
| American Community Survey 2012-2016 | Children living in single-Parent Households | 43.9 | 16 | 43.5 | 23.1 | 30.8 | 12.5 | 28.2 |
| American Community Survey 2012-2016 | People 25+ with a bachelor's degree or higher | 46.7 | 57 | 42.8 | 70.7 | 24.4 | 68.6 | 68.7 |

# Appendix VI. UCSF Workforce Development and Procurement Program Inventory

| UCSF "EXISTING WORKFORCE DEVELOPMENT, AND PROCUREMENT PROGRAMS | | | |
|---|---|---|---|
| **Category** | **Program** | **Program description** | **Website** |
| **Student Voluntarism & Service Learning Courses** | School of Nursing's Community Health System | community, those normally underserved by more mainstream health care systems, including the homeless and mentally ill. These practices also serve as vital educational placements for students to gain clinical experience in complex community environments. Programs include: The nurse-managed Glide Health Services provides free medical care to the city's homeless and underinsured. The nurse managed Primary Care Outreach for the Mentally Ill (PCOM) is a faculty practice in partnership with Progress Foundation providing primary care services to individuals with serious mental illness in community-based residential treatment programs. | https://nursing.ucsf.edu/about/departments/community-health-systems |
| | UCSF Medical Education Dept of Pediatrics | Pediatric Leaders Advancing Health Equity (PLUS) training program for pediatric residents to address structural problems in health equity for children, including workshops, a community based project, ongoing mentorship, and individualized development plans. | |
| **Academic Department Based Partnerships** | Clinical & Translational Science Institute | The Clinical & Translational Science Institute (CTSI) facilitates clinical and translational research to improve patient and community health. We do this by providing infrastructure, services and training to enable research to be conducted more efficiently, effectively and in new ways. Programs include: The Community Engagement & Health Policy (CE & HP) Program, which supports research that investigates, plans, applies and evaluates solutions to pressing public health problems. It focuses on bridging academic research, health policy and community practice to improve public health. The CTSI Pilot Awards Program | https://nursing.ucsf.edu/about/departments/community-health-systems |
| | Bridge to Biosciences/ Biotechnology Internship program | CCSF Lab Assistant Certificate Program | |
| | UCSF Center for Science Education, and Outreach | Early Academic Outreach Program (EAOP), which includes the PITCH summer program and CURE Internship. Other initiatives include Inside UCSF, Mathematics, Engineering, Science Achievement (MESA) Schools Program, P-20 Partnerships, and Upward Bound | |
| | Science & Health Education Partnership (SEP) | Bio&Chem Teach and High School Intern Program (part of larger California Institute of Regenerative Medicine's Summer Program to Accelerate Regenerative medicine Knowledge) | |
| | National Center of Excellence in Women's Health | Community engagement initiative includes the Youth Internship Programs, which includes the Youth Steering Committee, the Young Women's Health Leadership Summit, and Innovators in Young Women's Health Program | |
| | Citywide Focus | Serves 400 of the highest consumers of San Francisco Community Behavioral Health Services (CBHS) acute services with four culturally-focused Assertive Community Treatment (ACT) model teams. Program components include: client advocacy, assessment, and assistance, pre-vocational assessment and job training, an intern training program, and more | http://citywide.ucsf.edu/citywide-focus |
| | Linkage Team (CLT) and Probation | Provides two-to-four month comprehensive clinical and case management services to clients being discharged from psychiatric inpatient hospitals to the community. At any given time, approximately 75 clients are being served by this team. CLT has been critical in helping to reduce the length of inpatient stay at SFGH and thus minimize Medi-Cal decertified bed days. | http://citywide.ucsf.edu/programs |
| | Citywide Employment Program | Citywide Employment Program assists individuals with behavioral health needs attain competitive employment and has specialized services for those with a criminal justice history and/or pending legal charge. Programs include: Cooperative Partner to SF Department of Rehabilitation Stipend Volunteer-based Vocational Training at SFGH First Impressions, in partnership with Asian Neighborhood Design (AND) GROWTH Project (Growing Recovery and Opportunities for Work through Horticulture) Housing and Employment for Recovery Outcomes (HERO) | http://citywide.ucsf.edu/citywide-employment-services |
| | Citywide Case Management | The larger Citywide Case Mgmt dept also has a Citywide Focus that serves 400 of the highest consumers of SF Community Behavioral Health Services (CBHS), a Forensics Team that works with adults referred from the SF Behavioral Health Courth (BHC), and a Roving Team that works with residents of 26 service supported hotels with 2,446 units managed through the | http://citywide.ucsf.edu/programs |
| | Assisted Outpatient Therapy (AOT) | not engaged in care, and are on a downward spiral. | https://www.sfdph.org/dph/comupg/oservices/mentalHlt |
| | Forensics Team | illness, made more complicated with substance abuse and have long histories of felony level criminal justice involvement. The goal of the BHC is to engage clients in treatment under court supervision, as a way to resolve current criminal charges, reduce the likelihood for recidivism, and improve mental health outcomes. | http://citywide.ucsf.edu/programs |
| **University-Business Partnerships** | EXCEL | The UC San Francisco Excellence through Community Engagement & Learning (EXCEL) Program is a clerical/administrative training program which aims to develop the potential workforce in UCSF's surrounding | https://www.ucsf.edu/about/cgr/curre |
| | Local Construction Hiring Program | CityBuild Academy is partnered with UCSF for the Local Construction Hiring program, for all building projects that have total construction cost greater than $5 million. The current local hiring goal for such projects was 30%. | du/about/cgr/curre nt-projects/workforce |
| | Toolworks | "Toolworks was launched in 2009 at UCSF Medical Center – Toolworks is a Bay Area non-profit community bas | https://blog.sfgate.com/lshumaker/2015/02/07/people- |
| | Office of Diversity and Outreach, Learning and Organization Development | Leads skills development for staff, and provide internal diversity and inclusion training and certification programs, also includes the Multicultural Resource Center | |
| | Human Resources | Has tools such as Career Tracks: an internal initiative to review and develop standardized job classifications and descriptions, and the Temporary Employment Program: UCSF's internal temporary employment service with experience filling temporary administrative assistants, finance and pre/popst award professionals, analysts, medical administration, program assistants, and dental assistant positiitions | |
| | Networking Efforts Include | Veteran's Open House | |
| | | LBTQ job fairs, networking mixers, and presence at SF PRIDE | |
| | | 2018 Sponsor for Prospanica and presence in their national conference and job fair to attract Hispanic professionals | |
| | | African American MBA national and local chapter networking and job fair attendance | |
| | TechSF Apprenticeship | TechSF draws from a local pipeline of talent which boasts a participation rate of 50% women, 18% Latinos and 14% African-Americans. Most candidates are 30-40 years old and about half have a bachelor's degree. | |
| | UC Women's Initiative for Professional Development | UC WI is an experiential professional development program for women designed to elevate women in leadership, establish a pipeline for advancement, and contribute to women's and UC's success. | https://learning.ucsf.edu/uc-womens-initiative-professional- |
| | UCSF Fresno Latino Center for Medical Education and Research Program | The UCSF Fresno Latino Center provides multiple programs to address the serious shortage of Latino physicians and other health care professionals in the area. Initiatives include the Junior Doctors Academy and Doctors Academy, the Health Careers Opportunity Program, and the Summer Biomedical Internship Program | https://www.fresno.ucsf.edu/latino-center-for-medical-education-and-research/ |

| UCSF "EXISTING WORKFORCE DEVELOPMENT, AND PROCUREMENT PROGRAMS | | | |
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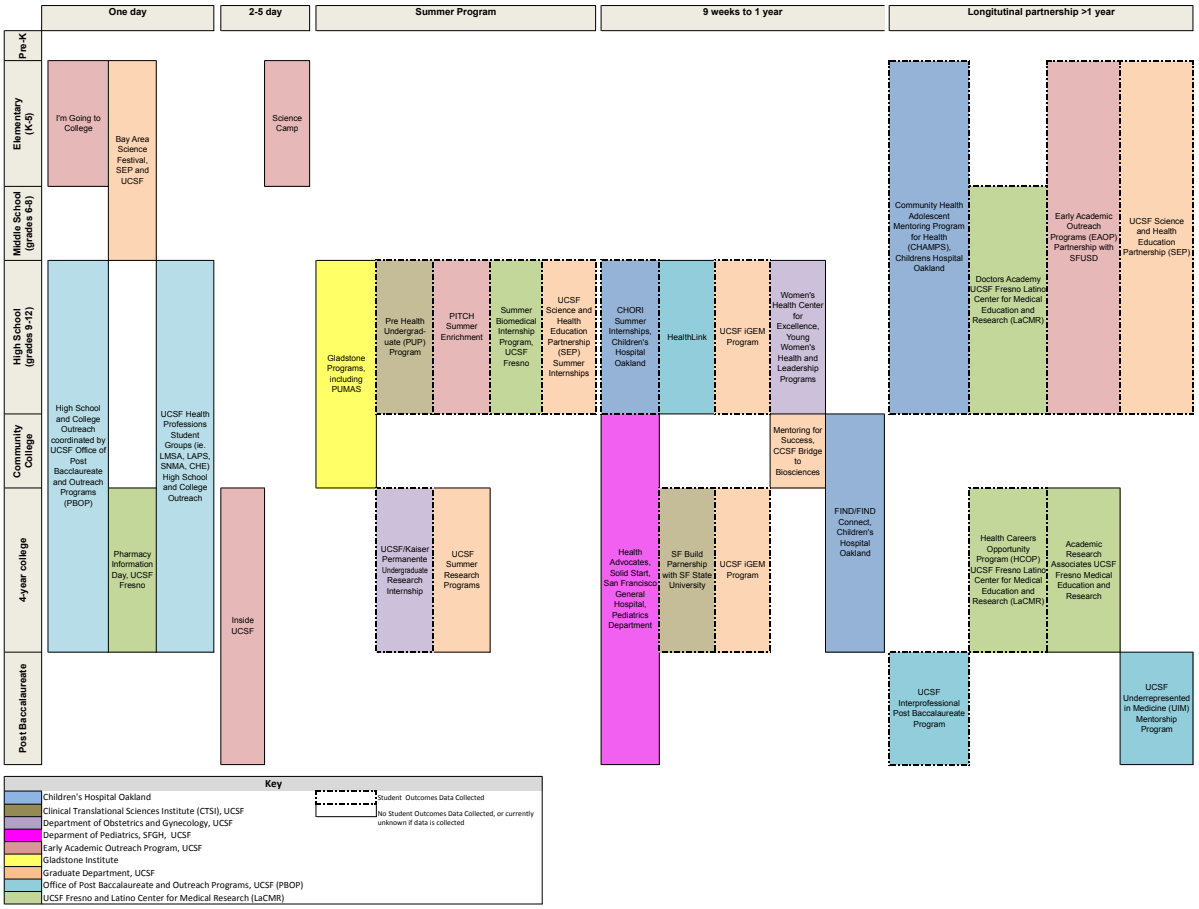
| **Category** | **Program** | **Program description** | **Website** |
| **Procurement** | Small Business Subcontracting Requirement | When the University is awarded more than $700,000 in funding, it is required to submit a Small Business Subcontracting Plan. | https://supplychain.ucsf.edu/small-business-subcontracting-plan |
| | Supplier Diversity Program | The University of California, San Francisco (UCSF) Supplier Diversity Program promotes business relationships and contract opportunities with small, diverse and disadvantaged businesses wishing to provide goods and services to the University community. Visit these pages to learn about the Supplier Diversity Program and how diverse businesses are supported at the University. | https://supplychain.ucsf.edu/supplier-diversity-program |
| | Diverse supplier locator tool | The UC System has contracted with a supplier to provide a diverse supplier locator tool to which Campus Buyers and Strategic Sourcing Specialists have access. If you are a Research Administrator, Laboratory Manager or Project Manager and wish to have access, please contact BearBuy@ucsf.edu so that she can set you up to access the database. The locator is a great tool for those departments needing to create Small Business Subcontracting Plans or wishing to purchase from diverse and disadvantaged businesses. | https://supplychain.ucsf.edu/supplier-diversity-resources |
| | Supplier Diversity Training | These three Supplier Diversity Basics Training Modules are designed for Principal Investigators, Research Administrators, Lab Managers, Project Managers, Purchasing Staff and Supervisors. | https://supplychain.ucsf.edu/supplier-diversity-training |
| | 20% Sustainable Food by 2020 | UCSF currently above that goal, at 25%. The definition for sustainable food includes locally grown | http://sustainability.ucsf.edu/what_ucsf_is_doing_2#food |
| **Investment** | UCSF Foundation Investment Company | " "the UCSF Foundation Investment Company provides professional stewardship of UCSF Foundation's financial assets and an endowment now valued at more than $1 billion. The endowment facilitates UCSF's work in education, scientific research, patient care, and public health. The non-profit Investment Company is led by its Chief Investment Officer and governed by the Investment Company Board, which comprises selected volunteer leaders from the UCSF Board of Overseers as well as external investment and business experts." | http://ucsfinvestco.org/index.html |
| **General Community Relations** | Charity and uncompensated care | In 2016, UCSF spent $41.4 million in Charity care (discounted health care to eligible patients) and $86.5 million in uncompensated care (Costs not covered by Medi-Cal) | https://www.ucsf.edu/about/economic-impact-report#the-2010-report |
| | Community Advisory Group | The mission of the Community Advisory Group is to (1) serve as a community advisory body and sounding board for UCSF administration on planning issues, based on both a neighborhood and a city-wide perspective; (2) assist UCSF in strengthening communication with and engagement of the public on broader issues of community concern; (3) provide essential and relevant feedback on programs, campus planning and development activities; and (4) identify strategies and actions for addressing community concerns. | https://www.ucsf.edu/cgr#communityrelations |
| | UCSF Advocates Program | UCSF Advocates is a community of UCSF students, faculty, staff, alumni and supporters who promote values and policies that are fundamental to UCSF's core missions of patient care, research and education. We connect with lawmakers, and take actions to educate people about policy issues that impact our work and our people. | https://www.ucsf.edu/cgr/advocacy |
| | Partnership Grants | The Center for Community Engagement offers grant funding to support projects that strengthen partnerships between San Francisco communities and UCSF to address health inequities. All grants are intended to fund partnership projects and programs where community-based organizations and UCSF affiliates work together. | https://partnerships.ucsf.edu/partnership-grants-program |

# Appendix VII. UCSF Pathway Outreach Pipeline Programs




**Catalog of Pipeline/Pathway/Outreach Programs at UCSF (2017)**

**Contacts: Wylie.Liu@ucsf.edu and Aimee.Medeiros@ucsf.edu**

| Main Program | Individual Program | Program Description | Students Served | Location of Program | Program Attributes/Focus | Website | Program Contact |
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| Academic Research Associates, UCSF Fresno | | Offered in association with the UCSF Fresno Medical Education Program, the Academic Research Associates (ARA) Program offers premedical undergraduate students a unique opportunity to observe clinical medicine and participate in biomedical research. The program takes place within the Emergency and Surgery Departments at Community Regional Medical Center, and participants may join the program on a volunteer basis, or receive college credit (1 unit at Fresno State as an elective course). | Undergraduate | Fresno | Research/HP Career Apprenticeship, Career Awareness and Motivation | http://www.fresno.ucsf.edu/em/academic_research_associates.htm | Bertha Dominguez, bdominguez@fresno.ucsf.edu |
| | | CHORI Summer Internships | | | | | |
| | Clinical Research Internships for High School Students (funded by Doris Duke) | The objective of this program is to provide clinical research training opportunities for High School students. The focus is on opportunities for students from disadvantaged backgrounds, racial and ethnic minorities, and others who are underrepresented in the biomedical sciences (e.g., individuals with disabilities). The Program provides the students with a clinical research training experience to stimulate interest in pursuing a career in biomedical, clinical or behavioral research in a friendly and nurturing environment. Scientific mentors in the program work at CHORI and UCSF Benioff Children's Hospital Oakland. Six students are chosen each spring for this program. | High School | Oakland | Research/Career Apprenticeship, Career Awareness and Motivation | http://www.chori.org/Education/Summer_Internship_Program/funded_unfunded.html | David Sabaria summerstudentprogram@chori.org |
| | Stem Cell Research Internships for High School Students Summer Program to Accelerate Regenerative Medicine Knowledge | The objective of this program is to provide summer research training opportunities for High School students interested in basic science research. The focus is on opportunities for students from disadvantaged backgrounds, racial and ethnic minorities, and others who are underrepresented in the biomedical sciences (e.g., individuals with disabilities). The Program provides the students with a clinical research training experience to stimulate interest in pursuing a career in biomedical, clinical or stem cell research in a friendly and nurturing environment. Scientific mentors in the program work at CHORI or UC Berkeley Stem Cell Center. Six students are chosen each summer for this program. | High School | Oakland | Research/Career Apprenticeship, Career Awareness and Motivation | http://www.chori.org/Education/Summer_Internship_Program/funded_unfunded.html | David Sabaria summerstudentprogram@chori.org |
| | Summer Research Internships for Undergraduates (funded by NIH) | The objective of this program is to provide short-term training opportunities for undergraduate, and occasionally medical and health professional students. The focus is on opportunities for students from disadvantaged backgrounds, racial and ethnic minorities, and others who are underrepresented in the biomedical sciences (e.g., individuals with disabilities). The Program provides the students with a basic science or clinical research training experience to stimulate interest in pursuing a career in biomedical, clinical or behavioral research in a friendly and nurturing environment. Scientific mentors in the program work at CHORI, UCSF Benioff Children's Hospital Oakland, UCSF and UC Berkeley. Twenty students are chosen each summer for this program. | High School | Oakland | Research/Career Apprenticeship, Career Awareness and Motivation | http://www.chori.org/Education/Summer_Internship_Program/funded_unfunded.html | David Sabaria summerstudentprogram@chori.org |
| | | | | | Research/Career Apprenticeship, Career Awareness and Motivation | http://www.chori.org/Education/Summer_Internship_Program/funded_unfunded.html | David Sabaria summerstudentprogram@chori.org |

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| Community Health and Adolescent Mentoring Program for Success (CHAMPS) at Children's Hospital Oakland | | Formerly known as FACES for the Future, CHAMPS is a three-year internship program that introduces underrepresented minority high school students to health professions. The CHAMPS program collaborates with local high schools, health academies, colleges, universities, medical schools and residency programs. The objective of CHAMPS is to introduce underrepresented minority high school students to the health professions, assist them in getting into educational programs of their choice, and equip them with the necessary personal skills to succeed in these and other demanding pursuits. Program involves: academic guidance and support, case management, healthcare education, hospital/healthcare internships, menotring, psychosocial services | | Oakland | Academic enhancement, science or math instruction/enrichment, career awareness and motivation, research and career apprenticeship | http://www.childrenshospitaloakland.org/main/champs.aspx | Young Kim Parker (510) 428-3681 |
| UCSF Fresno, Latino Center for Medical Education and Research (LaCMR) | | | | | | | |
| | Junior Doctor's Academy | The UCSF Fresno Latino Center provides multiple programs to address the serious shortage of Latino physicians and other health care professionals in the area. The mission of the Center is to develop individuals to become health care professionals who will ultimately return to the San Joaquin Valley and to provide culturally competent health care services to the medically underserved. | Middle School | Fresno | enhancement, science or math instruction/enrichment, career awareness and motivation, research | http://www.fresno.ucsf.edu/latinocenter/jdaabout.html | Bertha Dominguez, bdominguez@fresno.ucsf.edu |
| | Doctor's Academy | The UCSF Fresno Latino Center provides multiple programs to address the serious shortage of Latino physicians and other health care professionals in the area. The mission of the Center is to develop individuals to become health care professionals who will ultimately return to the San Joaquin Valley and to provide culturally competent health care services to the medically underserved. | High School | Fresno | enhancement, science or math instruction/enrichment, career awareness and motivation, research | http://www.fresno.ucsf.edu/latinocenter/daabout.html | Bertha Dominguez, bdominguez@fresno.ucsf.edu |
| | Health Care Opportunities Program (HCOP), UCSF Fresno | The Health Careers Opportunity Program is a partnership between the University of California, San Francisco Fresno Latino Center for Medical Education and Research and California State University Fresno (Fresno State) to provide support to disadvantaged Fresno State students committed to becoming competitive applicants to health professional schools. Selected students engage in a structured program of academic enrichment and social support, preparing them for admission into health professional school. The ultimate goal is for these individuals to become healthcare professionals that will practice in the Central Valley, providing care to the medically underserved. | Undergraduate | Fresno | Career awareness and motivation, research and career apprenticeship | http://www.fresno.ucsf.edu/latinocenter/hcopabout.html | Bertha Dominguez, bdominguez@fresno.ucsf.edu |
| Early Academic Outreach Programs (EAOP) | | | | | | | |
| | Summer Science Camp | Each June, the Early Academic Outreach Program supports UCSF students in holding a one-week free summer day camp at the Parnassus campus for rising fifth- and sixth-grade students. Summer Science Camp was established by UCSF School of Pharmacy student Heather Hertema in 2007 to excite, motivate, and inspire youth, especially those who are underrepresented and underserved in natural and health sciences to pursue the natural and health sciences both in college and as a career. Each year, the camp affords up to 55 students the opportunity to experience hands-on, inquiry-based science. The camp also promotes positive interaction with professional students, campus scientists, and health professionals who serve as role models. | 4-5th Grade | San Francisco | Career awareness and motivation | | Don Woodson |
| | EAOP Programs in ER Taylor Elementary and MLK Middle School (SFUSD) | College exposure trips, grade related workshops, paretnal involvement, 1-1 student advising | 4-8th Grade | San Francisco | Academic enhancement, science or math instruction/enrichment, career awareness and | http://eaop.ucsf.edu | Don Woodson |
| | EAOP Programs in Burton, June Jorden, Independence, Jefferson High Schools and International Studies AcademySchool (SFUSD) | College exposure trips, grade related workshops, paretnal involvement, 1-1 student advising | 9-12th Grade | San Francisco | enhancement, science or math instruction/enrichment, career awareness and motivation, research and career apprenticeship, parental involvement | http://eaop.ucsf.edu | Don Woodson |
| | I'm Going to College | We work with 4th graders (and their teachers) from E.R. Taylor Elementary school (free lunch/low-income kids/family) incorporating college information into their curriculum, this includes what college is, how to choose a college, how to pay for college, how to apply, etc. Their work culminates in a day at UCSF. The kids are admitted, they go to OAR to register, Financial Aid gives them a scholarship that they cash-in for a backpacks and that are filled with supplies. From there they attend classes that are taught by UCSF students. The classes are VERY hands on to keep their interest. It's all about planting the seed really early! | 4th Grade | San Francisco | Career awareness and motivation | http://eaop.ucsf.edu | Don Woodson |
| | PLAN on College | Plan on College! is a free, one-day, annual event for Bay Area students in the eighth grade and their parents or guardians. Attendees of Plan on College! will receive valuable information on course selection for high school, factors that impact college eligibility, college financial aid, and long-term benefits of a college education. Parent workshops are presented in English, Spanish and Cantonese by experts in the field. | 8th Grade | San Francisco | Career awareness and motivation | http://eaop.ucsf.edu/plan-college | Don Woodson |
| | PITCH (Program for Investigation and Training for Careers in Health) | [illegible] may be the first in their families to pursue a four-year college degree, to spend three weeks at UCSF, exploring careers in healthcare, and looking into the educational pathways that lead to different careers, and learning professional skills that will help them along the way. PITCH students are mentored by current UCSF students in the Graduate Division, dental school, pharmacy school, medical school, and nursing school as they complete a group research project and receive one-on-one and small group academic advising from EAOP counselors. PITCH has three core components: (1) Exposure to Careers in Health - presented through a combination of hands-on workshops or guest lectures, led by UCSF students, faculty and staff; (2) College Awareness - Assists students to better understanding the college search and application process; and (3) Group Work on a Research Project - PITCH students research a specific disease, which allows them to develop an understanding for the roles of the various health professionals treating the disease. | High School | San Francisco | Research and career apprenticeship, career awareness and motivation | http://eaop.ucsf.edu/pitch | Don Woodson |
| | MAP to College | MAP to College! is a free, one-day, annual college-going event held in the fall for Bay Area students in the 12th grade and their parents or guardians. Fall semester of a students' senior year in high school is a critical time for college applications. As colleges become more competitive and selective, it is important that students understand the nuances of each college application and how to write a strong personal essay. Attendees of MAP to College! can attend workshops on the UC application and personal statement, the CSU application, the Community College transfer path, the application and admissions process for private colleges and financial aid. Financial aid workshops are presented in English, Spanish and Cantonese. This event is targeted to students in the twelfth grade, but students of all grades are welcome to attend! | 12th Grade | San Francisco | Career awareness and motivation | http://eaop.ucsf.edu/resources | Don Woodson |
| Family Information & Navigation Desk (FIND), Children's Hospital Oakland | | The overarching goal of FIND is to routinely screen for basic social needs and thereafter, connect families to community resources. Additionally, FIND aims to train college students, community members, and professionals in the social determinants of health (SODH) approach to medical care.Located at Children's Primary Care Clinic and Emergency Department, trained staff and volunteers screen families for social issues affecting their health, including tobacco, as well as for basic social needs such as access to nutrition, housing, and utilities. | Community College and Undergraduate | Oakland, San Francisco | Research and career apprenticeship, career awareness and motivation | http://www.childrenshospitaloakland.org/main/departments-services/find-program-155.aspx | Dayna Long, MD & Kelley Meade, MD |
| Gladstone Programs | | | | | | | |
| | Gladstone Lab Day (Discover Gladstone) | Once per year, we ask public high schools throughout the Bay Area, and especially in underserved communities, to send their outstanding science students to Gladstone Lab Day. Approximately 150 of these students and their teachers attend this open house at our cutting-edge Mission Bay facility. The group participates in discussions and experiential demonstrations led by our researchers, learning more about the immense promise of biomedicine and biotechnology as well as career options in these rapidly expanding fields. | High School | San Francisco | Career awareness and motivation | http://gladstoneinstitutes.org/connect/outreach/high-school | Shannon Noonan, shannon.noonan@gladstone.ucsf.edu |

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| | Gladstone NLSC Scholars | Each summer, Gladstone grants full-ride scholarships to 12 sophomores and juniors from SFUSD to attend the National Student Leadership Conference (NSLC) on medicine & healthcare at UC Berkeley. Established more than 20 years ago, the NSLC has provided thousands of outstanding high school students from across the United States and over 70 countries with an insider's perspective on the most exciting professions in science, medicine, and healthcare, developing their leadership skills in the process. During each ten-day conference, all attendees (700+ students) visit Gladstone, where they participate in scientific presentations led by our investigators, postdocs and graduate students and conclude the day with a career panel in our Auditorium. | High school | San Francisco | Career awareness and motivation | http://gladstone.org/connect/outreach/pumas-internship-program | Shannon Noonan, shannon.noonan@gladstone.ucsf.edu |
| | Gladstone Summer Scholars (SCC) - No Longer Exists; last summer was Summer 2015 | and careers to disadvantaged students in the San Francisco Unified School District (SFUSD). For nine weeks each summer, we provide six underserved students from San Francisco public high schools with an opportunity to conduct scientific research, working in our labs alongside the foremost experts in science. Following their completion of "biotech boot camp" - an intensive, fifteen-hour introduction to biotechnology - interns are paired with a Gladstone scientific mentor to work on a specific research project. Students continue to spend approximately 75 percent of their time on the project, with the remaining 25 percent dedicated to supplementary educational activities, including scientific lectures, tours, social events, college counseling sessions, field trips, and team building exercises. The program culminates with a poster session in which students present their project hypotheses and findings to the entire Gladstone community. Since its inception in 2008, 41 students have completed the GSS program. Of this group, 39% (16/41) were underrepresented minorities in the sciences, and all came from low- to moderate-income families. In a recent survey of GSS alumni, 100% had pursued an undergraduate degree in the sciences, and all students who had recently received their degrees are attending or plan to attend graduate school in the sciences. This program is sponsored by Gladstone Institutes. | High School | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | http://gladstoneinstitutes.org/gss | Shannon Noonan, shannon.noonan@gladstone.ucsf.edu |
| | Promoting Underrepresented Minorities Advancing in the Sciences (PUMAS) | PUMA is a paid biomedical research internship program funded by an NIH/NIGMS grant. PUMAS aims to identify community college students from disadvantaged background who currently live in the Bay Area. During the program, PUMAS interns are paired with a scientific mentor and work on an individual research project in one of our laboratories. PUMAS interns work part-time (32hrs/week) over the course of 8-weeks and participate in a final poster session where they present their research findings to the scientific community here at Gladstone and UCSF. | City College-CCSF | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | http://gladstoneinstitutes.org/connect/outreach/pumas-internship-program | Shannon Noonan, shannon.noonan@gladstone.ucsf.edu |
| | Gladstone Adopt a School (Classroom Talks) | Glastone scientists do presentations in SFUSD Biotech and health CTE classes (as part of career Teach Ed classes in SFUSD high schools) | SFUSD | San Francisco | career awareness and motivation, sharing of biomedical concepts. | | Shannon Noonan, shannon.noonan@gladstone.ucsf.edu |
| HealthLink | | HealthLink is a partnership between UCSF medical students and community organizations. Our mission is to inspire and support high school students from communities that are under-represented in the health professions through mentorship and hands-on activities in the health sciences. We envision a future in which healthcare workers come from backgrounds that are as ethnically and economically diverse as the communities they serve. | | San Francisco | Career awareness and motivation, Mentorship | http://meded.ucsf.edu/outreach/medlink | Valerie Margol/LaTasha Mitchell |
| Inside UCSF | | Inside UCSF is an annual outreach program geared towards students at two- and four-year degree schools who are interested in pursuing careers in health and science. This interprofessional opportunity is designed to: introduce students to a specific health science career path; provide opportunities to meet with students and faculty; and offer a chance to become inspired about future career possibilities. | Community College, 4 year college, and Post-Bac | San Francisco | Career awareness and motivation | http://diversity.ucsf.edu/node/46 | Don Woodson/Angel-Max Guerrero |
| Mentoring for Success Training Program, Bridge to Biosciences | | The Mentoring for Success program is a mentoring training designed to help UCSF postdoctoral scholars gain mentoring experience and mentoring skills, with an emphasis on mentoring diverse students in the sciences. It is a partnership between UCSF's Office of Career and Professional Development (OCPD) and the City College of San Francisco (CCSF) Bridge to Biosciences program. Currently, this program is offered to any life science postdoctoral scholar working in a UCSF laboratory. UCSF mentors will work with interns enrolled in the Bridge to Biosciences program at CCSF. Bridge students are typically adults from diverse backgrounds (including some without any college degree) who are training for a career as a laboratory assistant or laboratory technician, although a few plan to continue on to professional or graduate school. The Bridge program offers a highly structured and contextualized curriculum designed with three goals in mind; (1) prepare students for their internship at UCSF and other bay area labs; (2) prepare students for employment in academia or in industry; and (3) Support students to continue their science education to graduate with a biotechnology certificate, a 2-year degree or transfer to a 4-year institution. | City College-CCSF | San Francisco | Career awareness and motivation, Mentorship | https://career.ucsf.edu/mentoring-success-training | Karen Leung, karen.leung@mail.ccsf.edu |
| Office of Academic Advancement Outreach and Recruitment (NOW: office of post baccalaureate and outreach programs) | | The School of Medicine Office of Outreach & Academic Advancement visits 4-5 local community colleges annually to talk about medical school admissions and post-bac programs. Schools include: SF City College, Ohlone College, Laney (Peralta Colleges), Diablo Valley College, De Anza College. | | Bay Area | Career awareness and motivation | | Valerie Margol |
| Pharmacy Information Day: UCSF Fresno, in Los Angeles, on campus at UCSF Parnassus | | This special program will help you discover pharmacy as a profession and learn about the training you need to succeed in this well-respected, highly-compensated healthcare field. Participants will learn about the unique role of pharmacists in healthcare, the many options for career specialization, and the workforce demand for pharmacy professionals. Students and faculty will share their insights on the Doctor of Pharmacy program at UCSF, the curriculum, admissions requirements, and preparation for the field of pharmacy. Program overview: (1) Career opportunities in pharmacy - Pharmacist panel; (2) Overview of the doctor of pharmacy curriculum; (3) Why pharmacy? Student-pharmacist panel; (4) Preparing a competitive application; and (5) Interprofessional Health Post-Baccalaureate Certificate Program Presentation (Optional) | | Fresno | Career awareness and motivation | https://pharmd.ucsf.edu/infoday | Leslie Mach, leslie.mach@ucsf.edu |
| Pre Health Undergraduate Program (PUP) | | The University of California, San Francisco (UCSF) Clinical and Translational Science Institute (CTSI) Training Program offers a summer clinical research training program for up to 15-20 undergraduate students, who are planning to attend dental, medical, nursing, pharmacy or physical therapy professional schools after graduation, and who have an interest in a career in clinical research. Students will be paired with a UCSF professional student who is enrolled in the Designing Clinical Research (DCR) course. The purpose of the course is to train students to evaluate the medical literature, to design clinical and translational research studies, and to encourage long-term collaborations between UCSF and undergraduate students. | Undergraduate | San Francisco | Research and career apprenticeship, career awareness and motivation, Mentorship | https://accelerate.ucsf.edu/training/pup | Christian Leiva, Christian.Leiva@ucsf.edu |
| | | Science and Health Education Partnership (SEP) | | | | | |
| | Science & Health Education Partnership (SEP) Teacher-Scientist Partnership Programs | UCSF volunteers partner with K-12 teachers to co-plan and co-teach a series of science lessons. | Elementary - High School | San Francisco | | http://biochemistry2.ucsf.edu/programs/sep/ | Katherine Nielsen and Rebecca Smith |
| | UCSF SEP High School Intern Program | Twenty high school students come to UCSF each summer to conduct biomedical research under the guidance of a scientist mentor. Program received the Presidential Award for Excellence in Science, Mathematics, and Engineering Mentoring in 2011. This program is currently funded by the California Institute for Regenerative Medicine, Silicon Valley Community Foundation, and the Baskin Family Foundation. | High School | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | http://sep-sfhi.ucsf.edu | Katherine Nielsen and Rebecca Smith |
| | Bay Area Science Festival | This ambitious collaborative public education initiative, led by UCSF SEP, brings together our leading academic, scientific, corporate, and non-profit institutions to showcase the region as an international leader in innovation. Each year, the 50+ festival events attract over 50,000 active participants, many of whom traditionally do not have access to quality scientific resources. | Elementary - High School | San Francisco | | http://www.bayareascience.org/ | Katherine Nielsen and Rebecca Smith |

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| SF Build | | The mission of SF BUILD is to enhance diversity in the biomedical research workforce by transforming the teaching and research environment at SF State into a safe space where students and faculty can represent different backgrounds and perspectives. In partnership with UCSF, students and faculty will receive training and mentoring to make significant contributions to biomedical research by asking questions that are relevant to local communities. | Undergraduate-SF State | San Francisco | | http://sfbuild.sfsu.edu | At SFSU: Leticia Marquez-Magana; at UCSF Esteban Burchard |
| Solid Start Health Advocate Program | | The Solid Start Health Advocate program trains a new generation of health care providers to better understand the impacts of social context on health. Since the fall of 2013, the Health Advocates has welcomed over 120 volunteers into the program. The majority of these volunteers are undergraduate and post-baccalaureate students interested in health care careers. To meet the needs of the patients at SFGH, 50-75% of our volunteers are bilingual English-Spanish speakers. We recruit by reaching out to student health care and health education groups, particularly those whose members may be Latino or interested in underserved populations. | Community College, Undergraduate, Post-Bac | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | https://sfghhealthadvocates.wordpress.com | Anais Amaya (at SFGH) |
| Summer Biomedical Sciences Internship, UCSF Fresno | | The Summer Biomedical Internship (SBI) program was established in 2006 to provide a quality biomedical research experience for students in the Central San Joaquin Valley. The program matches high school students, in the summer between their junior and senior year of high school with faculty members who have or are developing a research project. Students are chosen based on their scholastic abilities and must reside in the 6 county valley area. Students are matched with a faculty mentor on a project for approximately 6-7 during the summer. The internship also includes opportunities for field trips to local hospitals, UCSF main campus and to attend various lectures and grand rounds. The internship culminates in the "Presentation of Projects" on the first Wednesday in August. | | Fresno | Research and career apprenticeship, career awareness and motivation, mentorship | http://www.fresno.ucsf.edu/sbi/ | Bertha Dominguez, bdominguez@fresno.ucsf.edu |
| UCSF Graduate Division Summer Research Programs | | | | | | | |
| | Amgen Scholars | The Amgen Scholars Program provides summer research opportunities at UCSF for undergraduates in science and biotechnology. In addition to the summer research experience at UCSF, participants join other Amgen Scholars from across the country at a symposium where they share their summer experiences. | | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | https://graduate.ucsf.edu/srtp | Julia Clark |
| | Graduate Group In Biophysics | The Graduate Group in Biophysics offers students the opportunity to sharpen their research skills and enhance their graduate applications. In addition to laboratory research, all participants take part in all other aspects of the Summer Research Training Program (SRTP) for a comprehensive summer program. | | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | https://graduate.ucsf.edu/srtp | Julia Clark |
| | Graduate Group in Pharmaceutical Sciences and Pharmacogenomics | The Graduate Group in Pharmaceutical Sciences and Pharmacogenomics offers students the opportunity to sharpen their research skills and enhance their graduate applications. In addition to laboratory research, all students participate fully with the Summer Research Training Program (SRTP) for a comprehensive summer experience. | | San Francisco | Academic enhancement, science or math instruction/enrichment | https://graduate.ucsf.edu/srtp | Julia Clark |
| | NSF-REU Summer Research Program | The Research Experience for Undergraduates (REU) program provides state of the art hands-on training in the methods and logic of molecular biosciences with the goal of facilitating undergraduate students' successful transition to graduate research. Mentors for this program are drawn from the entire UCSF faculty and broadly represent all major approaches to modern biology. | | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | https://graduate.ucsf.edu/srtp | Julia Clark |
| | Summer Research Training Program (SRTP) | The SRTP provides research opportunities in the biomedical and biological sciences. Students are supported in these programs by funds from the Howard Hughes Medical Institute, Genentech, the University of California Office of the President, and UCSF Graduate Division. | | San Francisco | apprenticeship, academic enhancement, science or math | https://graduate.ucsf.edu/srtp | Julia Clark |
| | UCSF-Tuskegee Partnership in Bioengineering | The UCSF-Tuskegee Partnership in Bioengineering provides summer research opportunities with bioengineering faculty at UCSF for undergraduate students at Tuskegee university majoring in engineering or the physical sciences. Additional activities are provided during the summer and school year to train students how to design experiments, critically analyze data, and effectively communicate results to the scientific community. | | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | https://graduate.ucsf.edu/srtp | Julia Clark |
| UCSF iGEM Program | | Our program combines high school outreach with the International Genetically Engineered Machines Competition (iGEM). Promising young students from the San Francisco Unified School District's Abraham Lincoln High School spend the summer working together as a team, along with researchers at the University of California-San Francisco. We've also expanded our program in recent years to include local undergraduates and exchange students from Peking University with our ALHS students. They design and implement a project in synthetic biology with which they compete at the iGEM Jamboree in Boston in the Fall. | High School-Abraham Lincoln Highschool (SFUSD) | San Francisco | Research and career apprenticeship, career awareness and motivation, mentorship | http://igem.ucsf.edu/ | Wendel Lim |
| UCSF Interprofessional Post Baclaureate Program | | The Interprofessional Health Post-Baccalaureate Certificate Program is a year-long, structured program designed for those who have completed the required undergraduate coursework but feel they need a stronger academic foundation to be more competitive in applying to medical, pharmacy, or dental school. Program applicants must have been previously unsuccessful in gaining admission to the UCSF School of Pharmacy or Medicine or Dentistry. We are especially interested in individuals from disadvantaged backgrounds, underserved communities. | Post-Bacclaureate | San Francisco | Academic enhancement, science or math instruction/enrichment, career awareness and motivation, research and career apprenticeship | http://meded.ucsf.edu/outreach/interprofessional-health-post-baccalaureate-certificate-program | Valerie Margol |
| UCSF Student Group Outreach and Recruitment to High School and Undergraduate Students | | | | | | | Valerie Margol |
| | Chicanos/Latinos In Health Education | CHE (Chicanos/Latinos in Health Education) is an umbrella organization of LMSA (Latino Medical Student Association), HSDA (Hispanic Dental Student Association), LAPS (Latino Association of Pharmacy Students), and Voces Latinas Nursing Student Association. CHE unites Latino students and those interested in the Latino community, from within the various professional schools at UCSF. Our mission consists of an interdisciplinary approach that offers outreach, mentoring, cultural awareness, health education, and direct services to diverse communities in San Francisco and the greater Bay Area. Our goal is to unite as professional students who come from humble origins, in the hopes of serving as an inspiration to youth and future leaders in the health professions. | High School and Undergraduate | | Career Awareness | http://ucsf.orgsync.com/org/chicanoslatinosinhealtheducation62336 | LMSA Leaders/Alma Martinez Faculty Advisor |
| | Hispanic Student Dental Association | The Hispanic Dental Association (HDA) is a national, non-profit organization comprised of oral health professionals and students dedicated to promoting and improving the oral health of the Hispanic community. In addition, they provide advocacy for Hispanic oral health professionals across the US. As one of the leading voices for Hispanic oral health in California, the UCSF student chapter of HDA promotes service, health education, advocacy and leadership to strengthen our Hispanic student community at UCSF. To reach this goal, we organize health fairs and mentorship events as well as socials, fundraisers, and community service events. In addition, we partner with the Chicanos/Latinos for Health Education (CHE), an organization where the Schools of Medicine, Nursing, Pharmacy and Dentistry at UCSF come together to reach our main objective to one day eliminate health disparities in the Bay area. | High School and Undergraduate | | Career Awareness | http://hdassoc.org/community-outreach/ | Faculty Contact: George Taylor Assoc. Dean of Diversity (UCSF SoD) |
| | LAP Association at UCSF | The Latino Association of Pharmacy Students (LAPS) is a culturally diverse group of students devoted to providing health care services, education and outreach to under-served communities. Our main focus is to serve the Latinos in our community and to provide valuable health education and services, especially in the pharmacy setting. LAPS also strives to teach students about the Spanish language and the Latino culture, so that we may interact more effectively with the populations we serve. | High School and Undergraduate | | Career Awareness | http://sites.google.com/site/ucsfrcolaps/ | LAPS president: Cesar Rodriguez, cesar.rodriguez@ucsf.edu/Megan Dross (SoP student affairs coordinator) |
| | OAA suported student group outeach | Visits to local undergraduate institutions (either as featured speakers, panelists or tabling at conferences) | High School and Undergraduate | | Career Awareness | | Valerie Margol |
| | Latino Medical Student Association at UCSF | The Latino Medical Student Association mission is to recruit and support individuals in the healthcare professions who will strive to improve the access and delivery of healthcare to Latinos and medically undeserved populations. The LMSA chapter at UCSF seeks to promote this mission as well as to provide a network of support to its member medical students. | High School and Undergraduate | | Career Awareness | http://ucsf.orgsync.com/org/lmsa | LMSA Leaders (currently Miguel Linares and Angel Rosario)/Alma Martinez Faculty Advisor |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Pilipinos of UCSF Student Organization (PUSO) | We aim to provide insight into multiple health professions, to inspire young scholars to pursue their professional interests regardless of their respective backgrounds, to foster a sense of community among the students at UCSF, and to better understand our surrounding community and to help provide the needs of the Filipino community in the san francisco bay area. | High School and Undergraduate | | Career Awareness | https://orgsync.com/62349/chapter | pusosf@gmail.com, or Blanket Student life: Kathy Chew or Jennifer Rosko |
| | PRIME Summer Outreach - Health Pipeline Programs | PRIME hosts 4-5 health pipeline organizations to come and visit the UCSF campus during the summer. We have current partners that we invite, Mentoring in Medicine and Science, Huckleberry Youth Wellness Academy, San Francisco State Summer Science Institute, FACES for the Future. PRIME students work with the coordinators of the pipeline programs to develope a site visit that is inline with the interests of thier programs. Some typical activities include a tour, a medical student panel, specimen/organ hands on activity. Each program visits UCSF once for about 3 hours. | High School and Undergraduate | | Career Awareness | https://meded.ucsf.edu/prime | Aisha Queen Johnson |
| | Student National Medical Association (SNMA) | SNMA is committed to increasing the pipeline of students of color that consider and prepare for medical & scientific careers. Its community mentoring programs provide science appreciation and education, mentoring, and academic enrichment to students interested in pursuing health-related careers. At UCSF, SNMA provides academic preparation, recruitment and retention programming in order to assure the pipeline to medicine is supported. | High School and Undergraduate | | Career Awareness | http://ucsf.orgsync.com/org/studentnationalmedicalassociation62285/home | SNMA Leader (currently Tiana Wooldridge)/staff contact Doquyen Tran Taylor |
| | Voces Latinas, UCSF nursing student association | Voces Latinas Nursing Student Association (VOCES) is a student-based organization at the University of California, San Francisco (UCSF). The purpose of VOCES is to unite students from diverse backgrounds with an interest and passion for the Latino community. Through our educational journey, unique backgrounds, and commitment to community- we aspire to be a source of support to our peers, while highlighting the rewarding field of nursing. | High School and Undergraduate | | Career Awareness | https://www.facebook.com/voceslatinasucsf | Gabriela Chica, gabriela.chica@ucsf.edu ; or Sergio Saenz (staff outreach coordinator SoN) |
| | Pharmacy Alliance for Mentorship, Leadership, and Information | The goal of the PHAMLI Mentoring Program is to establish a network between pharmacy students at UCSF and those students who express interest in entering pharmacy school by creating long term one-on-one relationships between pharmacy and pre-pharmacy students. | undergraduate | | Career Awareness | http://phamli.weebly.com/ | phamli@gmail.com, or Blanket Student life: Kathy Chew or Jennifer Rosko |
| | Student National Dental Association (SNDA) | SNDA's mission is to promote diversity here on the UCSF campus, especially within the dental school. We strive to encourage undergraduate students and younger from disadvantaged backgrounds to consider dentistry as a profession. We provide support and resources to aid these students to achieve their goals to enter dentistry or other health professional fields. | High School and Undergraduate | | Career Awareness | | Ethan Do, Ethan.Do@ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| | Children's Health Hut | CCHA is set on working to improve the lack of proper oral healthcare in the many underserved areas of SF by promoting awareness for supervised brushing/flossing so that children can receive optimal sustained proper oral hygiene instructions and education from their respective program coordinators. | Youth/community | | health and health Awareness | http://chh.atucsf.com/ | Irene Ching, Irene.Ching@ucsf.edu |
| | Women's Empowerment and Health Education in the San Francisco County Jail (WEHE) | Our mission is to help female and transgender inmates better understand their bodies, reduce STIs and unwanted pregnancies, and learn about important health screening. We have developed several 60-90-minute workshops that meet once a week at the San Francisco County Jail. Our curriculum involves anatomy models and diagrams (hands-on learning), games (jeopardy and family feud), and teach-backs (providing the opportunity for women to teach one another and take ownership of the material). During the fall quarter, we also lead an interprofessional elective (1.0 credits P/F). The Health of Incarcerated Patients Elective brings together students from the UCSF health professional schools to learn about the correctional health system and about the health care challenges of a unique underserved community. Each week, various speakers including former inmates, jail and prison health service professionals, and advocates, share their experiences and knowledge with the class. | Incarcarated youth/adults | | health awareness | | Suita Castro, suita.castro@ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| | CHE | CHE (Chicanos/Latinos in Health Education) is an umbrella organization of LMSA (Latino Medical Student Association), HSDA (Hispanic Dental Student Association), LAPS (Latino Association of Pharmacy Students), and Voces Latinas Nursing Student Association. CHE unites Latino students and those interested in the Latino community, from within the various professional schools at UCSF. Our mission consists of an interdisciplinary approach that offers outreach, mentoring, cultural awareness, health education, and direct services to diverse communities in San Francisco and the greater Bay Area. Our goal is to unite as professional students who come from humble origins, in the hopes of serving as an inspiration to youth and future leaders in the health professions. | Youth/community | | career awareness + community engagement | https://www.facebook.com/UCSFCHE/ | Adam Rodriguez, adam.rodriguez@ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| | Filipino Dental Student Coalition (FDSC) | An organization with a mission to unify the UCSF dental community in providing care and oral health education to the Filipino population. Furthermore, we strive to develop interest in health professions in Filipino-American youth, create and maintain a network of information and resources between dental care professionals, and foster appreciation and awareness of Filipino culture. | Youth/community | | career awareness + community engagement | https://www.facebook.com/FDSCatUCSF?ref=br_tf | maritess.aristorenas@ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| | NAHA (Native American Health Alliance | Established in 1986, the Native American Health Alliance (NAHA) is comprised of UCSF students, staff and faculty of Native descent (and their supporters) who are working together to advance representation of Native Americans on campus. NAHA also promotes cultural understanding and an awareness of the health disparities affecting Native American/Alaskan Native peoples through educational programs and campus events. | Youth/community | | career awareness + community engagement | nativeamericanhealthalliance62345 | Naha@listsrv.ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| | Asian Pacific American Medical Student Association | The Asian Pacific American Medical Students Association (APAMSA) is a national organization of medical and pre-medical students committed to addressing the unique health challenges of Asian and Pacific Islander American (APIA) communities. APAMSA serves as a forum for student leaders to engage these health issues and develop initiatives and projects addressing those needs. The local, regional, and national activities of APAMSA aim to promote the health of the APIA community and help healthcare workers understand how to care for APIA patients in a culturally sensitive manner. Finally, APAMSA provides an important venue for medical students to meet, exchange experiences, and develop personally and professionally through leadership and service. APAMSA's foundation was laid in 1993 by Asian American students worried about the present and future of the APIA community. B Li co- founded the e-mail bulletin board 'AAMSnet' for Asian American medical students in 1994 and co-formed the Asian Pacific American Medical Student Association in 1995. APAMSA was formed because issues of APIA health were largely ignored by existing organizations. Since its initial formation in 1995, APAMSA chapters have formed at schools across the country to improve the health and well-being of the APIA community and promote understanding of the unique challenges Asian Pacific Americans face in medicine.(UCSF Chapter) (APAMSA) | Youth/community | | career awareness + community engagement | http://www.apamsa.org/ | apamsa@ucsf.edu; or Blanket Student Life: Kathy Chew or Jennifer Rosko |
| UCSF/Kaiser Permanente Undergraduate Research Internship (URI) | | To build a more supportive pathway for underrepresented University of California, Berkeley, undergraduate students interested in a career in medicine, we continue to develop our Undergraduate Research Internship program (URI). Annually, URI engages 16 interns in a meaningful research project, clinical shadowing at UCSF and Kaiser Oakland, didactics, leadership training, and extensive mentoring during the 8-week program, as well as through the medical school application process. | High School and Undergraduate | San Francisco, Oakland | Research and career apprenticeship, career awareness and motivation, mentorship | https://oakri.ucsf.edu/medical-student-program/ucsfkaiser-permanente-undergraduate-research-internship-uri | Andrea Jackson, andrea.jackson@ucsf.edu |
| Women's Health Center for Excellence | | | | | | | |
| | Young Women's Health & Leadership Programs - Innovators in Young Women's Health Program | The Innovators in Young Women's Health Program (Innovators) is a prominent health and leadership training program which empowers young women to create a project that uniquely addresses young women's health needs specific to their school community. Innovators are hired by the UCSF National Center of Excellence in Women's Health. Innovators is based on a positive youth development approach that emphasizes each girl's strengths and assets. Working in teams, students develop a project for their school and implement it with the assistance of an adult ally in the school (wellness center staff, nurse, teacher, etc.). Innovators concludes in May with a celebration during which each team presents their projects. | High School | San Francisco | Academic enhancement, career awareness and motivation | http://www.coe.ucsf.edu/coe/internship/ywh_innovations_awards_2013-2014.html | Judy Young, youngj@obgyn.ucsf.edu (Nancy Milliken) |
| | Youth Steering Community | The Youth Steering Committee (YSC) is a young women's health and leadership program for a group of diverse high school girls from SF public and charter schools. The YSC works together for 9 months to explore young women's health issues and to create a health & leadership summit for other high school girls. The YSC is based on a positive youth development philosophy which emphasizes the strengths and assets of young women and encourages them to see themselves as leaders among their peers, within their schools, and throughout their community. The YSC is designed to be a safe place where young women can come together to share their thoughts and ideas, develop self-confidence, and build leadership skills. | High School | San Francisco | Academic enhancement, career awareness and motivation | http://www.coe.ucsf.edu/coe/internship/intern_ysc.html | Judy Young, youngj@obgyn.ucsf.edu |

# VIII. San Francisco Workforce Development Program Inventory

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Immigrants | Central Market/Tenderloin | South of Market Community Action Network (SOMCAN) | Workforce Development & Employer Access Program | Foundational competencies and job search services | Our Workforce Development Program helps with: creating or updating resumes, looking for work, understanding your worker rights, advice about discrimination at work, referrals to legal advice. | No | http://www.somcan.org/services |
| | Central Market/Tenderloin | Vietnamese Youth Development Center | Youth Leadership Development; Employment Opportunities | Foumdational competencies, HS diplpoma completion, job counseling and training | Our Youth Leadership Development services offer unique opportunities for San Francisco refugees and immigrants to create change from within their own communities. We provide underserved Southeast Asians, including Vietnamese, Cambodians, and Laotians, with the resources and guidance they need to learn new skills, forge their own paths, and be who they want to be. The Tenderloin Youth Leadership program helps youth to learn the context they are living in and become confident leaders and advocates. | No | http://www.vydc.org/services/community-and-family-programs |
| | Chinatown | Cameron House | Adult Education - Computer and English classes | ESL, Foundational Competencies | | No | https://cameronhouse.org/adult/adult-education/ |
| | Chinatown | Chinatown YMCA | Adult ESL Program | ESL, Foundational Competencies | Our Adult ESL Program serves individuals that struggle to read, write, or speak English. It incorporates both the ESL competencies in the classroom and real life experience practice outside of the classroom to help students learn and retain English. | No | https://www.ymcasf.org/programs/social-support-services- |
| | Chinatown | Chinese Progressive Association | Hospitality and Vocational Training Program | VESL, job training, foundational competencies | The Hospitality and Vocational Training (HVT) program was started in 2006 in partnership with the City College of San Francisco's ESL program and Chinese for Affirmative Action. Through the program, participants study vocational English, learn | Hospitality | http://www.cpasf.org/node/590 |
| | Chinatown | Chinese Newcomer Services Center | Free Job Search & Referral Service | Job search and referral assistance | Chinese Newcomers Service Center has a dedicated team of staff and volunteers who provide job referrals, seminars, workshops, and other resources. Every year, our team is able to help place hundreds of job seekers. We work diligently help to place job | No | http://www.chinesenewcomers.org/en/free-job-search-referral- |
| | Chinatown | APA Family Support Services | Workforce Development Program | foundational competencies, job referal, search and assistance | We offer employment support services in all of our locations. Services provided include: Resume building Interview Skills | No | http://www.apafss.org/employment-support.html |
| | Chinatown | Chinese for Affirmative Action | Employment Services | service connection and referral | CAA places hundreds of primarily immigrant jobseekers in construction and hospitality work, as well as vocational training programs. Our support includes general assistance, client advocacy, and information and referral work. Special efforts are | Construction and hospitality | http://www.caasf.org/what-we-do/community-building/ |
| | Downtown | Upwardly Global | Job Search Program | Job training and job search assistance | Upwardly Global helps work-authorized immigrants, refugees, asylees, and Special Immigrant Visa holders (SIVs) restart their professional careers in the United States. The organization provides customized training and support through the online Job | No | https://www.upwardlyglobal.org/get-hired/ |
| | Mission, Central Market Area | Mission Hiring Hall | Homeless Employment Collaborative, San Francisco Training Partnership | Job preparation and placement services | Job search/job preparation services and direct placement program. Trainings offered, Construction Trades and Office plus STEPS (Security Guard Card) | Construction, office, security | http://missionhiringhall.org/jobseekers/ |
| | Mission | MEDA | Sector-Based Training | career counseling and assessment, readiness training, job placement and retention services | MEDA exclusively offers three training programs that are designed to provide entry points into the retail, financial and technology sectors. The Mission Techies program teaches participants 18 years and older IT essentials of hardware, software, networking and coding, plus how to provide tech support to low-income families. The Mission Admins program is a six week adult training program that provides job training to become administration professionals. All programs provide job-readiness training, professional skills, ongoing placement, retention services, college prep and knowledge of how to enroll in post-secondary education. In addition, MEDA also provides basic and intermediate digital LIteracy classes and serves as the SFOEWD Mission Neighborhood Access Point. | IT, administration | http://medasf.org/ |
| | Mission | Mission Language Vocational School | Medical Assisting; Culinary Arts; Professional Baking; Restaurant | VESL; sector training | 36 week medical assisting program available to both native and ESL speakers. MLVS groups students into programmatic tracts depending on students' capabilities, interests and acuity. These tracks are Medical Assisting Administrative, Medical Assisting | Healthcare and hospitality | http://mlvschool.org/our-programs/ |
| | Mission | Arriba Juntos | VESL Immersion Program | VESL, Foundational capacities | An intensive English language immersion program that focuses on teaching vocabulary and the cultural customs of the workplace. Included in this program is a paid work participation component. Participants progress from the lowest level of language ability to a | No | http://www.arribajuntos.org/programs/esl |
| | Portola | San Francisco Community Empowerment Center | Job Training and ESL programs | ESL, foundational competencies, job training, job search and retention | To help job seekers to improve their chance for hiring, to improve their resume and cover letter writing, identify effective job skills, To provide support for job resources and training, to empower job seekers to be more competitive for | No | http://www.sfcec.org/programs/jobtraining |
| | Richmond | · Community Youth Center – SF | Job Readiness for English Language Learners (JRELL); | VESL, career navigation | JRELL provides youth, ages 14-18, who are primarily immigrant English Language Learners with a workforce program that focuses on removing barriers to employment through a skills building curriculum and workplace experience to ensure they are | No | https://www.cycsf.org/component/workforce-development/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Seniors | Financial District | Self Help for the Elderly | Senior Community Service Employment Program | Sector training programs | Our senior community service employment program (SCSEP) allows participants to enroll in classroom training programs in housekeeping and home health aide or on-the-job training. ETED has received grants from the Mayor's Office of Economic and Workforce Development (MOEWD), Mayor's Office of Community Development (MOCD), Employment Development Department (EDD), Human Services Agency (HSA), National Asian Pacific Center on Aging (NAPCA), Alameda County (AC), etc. | housekeeping, home health aide, or on-the-job training | https://www.selfhelpelderly.org/our-services/employment-services/job-placements-and-employment-training |
| | Pac Heights | Booker T Washington Community Service Center | Booker T. Washington Technology Skills Program | Foundational competencies | Booker T. Washington Technology Skills Program is dedicated to inclusion in the growing digital movement. The program in design to teach basic, and advanced technology skills and increase the accessibility of technology to families and low-income members of our community. | No | http://btwcsc.org/programs-2/ |
| | | | | | | | |
| Persons with disabilities | Central Market/Tenderloin | The Arc of San Francisco | Adult Life & Skills program, Continuing Ed & Employment development; Career Placement and Advancement program | foundational competencies, job training, assessment and placement | Employment minded individuals or those with Career Certificates receive individual career assessments, job training and placement plus ongoing coaching and career development for both part-time and full-time competitive jobs.<br><br>The Arc serves as an SFOEWD Specialized Access Point for Individuals with disabilities | Administration, IT, hospitality | http://www.thearcsf.org/ |
| | Central Market/Tenderloin | Larkin Street Youth Services | Case Management | case management, foundational competencies, career couseling and placement services | Edward II, Ellis Street Apartments, and Routz: long-term supportive housing with on-site case management; with a focus on young people with mental illness at Routz. | No | https://larkinstreetyouth.org/what-we-do/#section-education-employment |
| | Central Market/Tenderloin | Asian Neighborhood Design | First Impressions | Case management, Sector training | The goals of FIP are to increase consumer engagement by involving them in the decision making process, thereby increasing their mental health wellness and recovery and to help consumer learn marketable job skills, receive on-the-job training and mentoring and secure meaningful employment opportunities.<br><br>Training in basic construction and remodeling skills may include but not limited to: patching and painting walls, ceilings and doors; changing/applying window dressings; hanging décor; installing and disposing of furniture and accessories; building furniture; cleaning and repairing flooring; graffiti abatement; minor landscaping, etc. This program will not entail heavy construction. Now in its second year, the First Impressions Project is a collaboration between UCSF Citywide Employment Program, San Francisco Department of Public Health and Asian Neighborhood Design. | Construction | http://www.andnet.org/first-impressions/ |
| | Downtown | Toolworks | Programs for people with developmental disabilities amd Deaf and hard of hearing | case management, job training, retention services, placement | Toolworks uses the highly successful Project SEARCH model of internship and training for people with disabilities. We identify tasks and departments most suited to the abilities of the | Janitorial, hospitality, green sector | https://www.toolworks.org/people/training- |
| | Downtown | Bridges from School to Work | Youth with Disabilities Program | case management, job training, placement, career | The San Francisco offices of Bridges from School to Work matches youth with disabilities between the ages of 17 and 24 with entry-level job positions in local San Francisco area | na | http://www.bridgestowork.org/locations/san- |
| | Downtown | · Positive Resource Center | PRC Employment Services | Foundational competencies, career assessment, navigatioon, and job search | PRC Employment Services offers individualized supportive services for people with disabilities who want to pursue their vocational interests through career exploration, training and education, or a job search.<br><br>PRC Employment Services offers career navigation services, which include labor market research, skill interest testing, values and interest exploration, identification of workplace limitations, and assistance in defining a career goal. PRC Employment Services partners with the California Department of Rehabilitation to support individual enrollment in diverse training and education programs at the certificate level, 2-year college level, and 4-year college level. PRC serves as an SFOEWD Specialized Access Point for Individuals with disabilities.<br><br>RAMS-Summer BRIDGE program for youth, and also in the process of creating a program for TAY-youth (16-24). | No | http://prcsf.org/employment-services/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Persons with disabilities | Outer Richmond | Richmond Area Multi-Services. Inc. (RAMS) | Hire-Ability Vocational Services, Peer Specialist Mental Health Certificate, Summer Bridge | | Hire-Ability is non-profit vocational services program, and division of RAMS, partnered with San Francisco Department of Public Health and California State Department of Rehabilitation which serves the San Francisco Bay Area community by connecting employers with trained, assessed and pre-qualified employees.We specialize in providing employers with a pool of employees that reflect the diverse and multicultural population of the region. Specifically, we assist employers in achieving their diversity goals by matching them with qualified individuals with disabilities.<br><br>In 2010, Richmond Area Multi-Services, Inc. and San Francisco State University jointly developed the Peer Specialist Mental Health Certificate Program. Funded by the Mental Health Services Act (MHSA), the primary goal of the Certificate program is to prepare consumers of community behavioral health services or family members with the basic skills and knowledge for entry-level peer specialist/counseling roles in this system as well as to provide people with experience and opportunities to further their career in the behavioral health field. | IT (information technology, technical support, customer service), Janitorial, Hospitality, food service, clerical | https://www.ramsinc.org/services.html |
| | Potrero Hill | RAMS' Hire-Ability | Employee Development, Work Adjustment, Situational Assessment, Cafe Phoenix, Janitorial Training, Helpdesk Training, Desktop Training, and Employment Services | Case management, career counseling, core competency training, vocational and on-the-job training, job placement and retention services | Hire-Ability serves as a bridge between the business community and the mental health system for people who are ready, willing, and able to return to work.We offer culturally competent vocational services to individuals with mental health disabilities. The goal is to enable participants to gain successful employment and improve self-sufficiency by providing a continuum of services from job preparation to employment in the community. Below are program summaries:<br><br>Employee Development (E.D.), Work Adjustment, and Program Situational Assessment Programs are designed to serve individuals who need basic job preparation and paid work experience in a structured group setting.<br><br>Cafe Phoenix food service assessment program is designed to assess PAES Counseling and Pre-Vocational Services individuals for work readiness and to work in food service, coffee shops and related businesses. Janitorial Training Program is designed to serve individuals who interested in getting trained in the janitorial field.Helpdesk Training Program is designed to serve individuals who want training on-the-job training while providing front end user support primarily over the phone under the direct supervision of the instructor.DeskTop Training Program is designed to serve individuals who want on-the-job training while providing desktop, hardware break/fix and software support under the direct supervision of the instructor.<br><br>Employment Services (E.S.) Program is designed to serve individuals who want to be placed and receive support in the open job market | IT (information technology, technical support, customer service), Janitorial, food service, clerical | http://www.hire-ability.org/index.html |
| | Western Addition | Hearing and Speech Center | Career Step Program Employment | career counseling, training, foundational capacities, and job | The Career Steps program serves Deaf and Hard-of-Hearing youth ages 18-24 in San Francisco through a curriculum including individual counseling, group workshops, and career | No | https://www.hearingspeech.org/services/education- |
| PLWHA | Central Market/Tenderloin | Larkin Street Youth Services | Case Management | case management, foundational competencies, career couseling and placement services | Assisted Care/After Care (AC/AC), The Hugo and Hyde Street: congregate and scattered site housing, plus an onsite HIV specialty care clinic for young people who are HIV positive. | No | https://larkinstreetyouth.org/what-we-do/#section-education-employment |
| | Mission | Dolores Street Community Services | Richard M Cohen Residence | Case managemend and referral services | The Richard M. Cohen Residence, a 10-unit residential care facility for formerly homeless men and women with disabling HIV/AIDS, provides an array of services including nursing and social work case management, 24-hour attendant care, meal services, and social activities designed to stabilize the health and enhance the well-being of residents. | No | https://www.dscs.org/housing/ |
| | Potrero Hill | Rafiki Coalition | Rafiki Housing and Case Management | Case management an referral services | Our 11-bed transitional house provides a comforting, supportive and empowering program to residents dealing with HIV/AIDS, homelessness, substance abuse, and/or mental health concerns. While African-Americans are our target community, the program is open to anyone who is living with HIV/AIDS and needs transitional housing, counseling and referral services.<br><br>Rafiki's case management services ensure that people living with HIV/AIDS in our transitional housing have access to public and private benefits, housing, quality medical care and other social services and information for healthy living. | No | http://rafikicoalition.org/hivaids-programs-and-services/ |

| Examples of San Francisco Workforce Development Programs for Vulnerable Populations | | | | | | | |
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| **Target Population** | **Neighborhood** | **Organization** | **Workforce Program(s)** | **Program Services** | **Program Description** | **Training for Specific Industry?** | **Website** |
| Transitional Age Youth | Bayview Hunters Point | Bayview Hunters Point YMCA | Primed & Prepped Culinary Arts Program, Workforce Development & Transitional Age Youth PRogram | Sector training, case management, job placement services | Our students have internships at Intercontinental Hotel, Fairmont Hotel, Marriott Hotel, Sears Fine Food and Lori's Diner. The Bayview YMCA Workforce Development & Transitional Age Youth Program helps job seekers transition to become self-sufficient adults by providing workshops and case-management through strength based, restorative approaches. We combine case management with wrap around services and support to provide members with the skills and resiliency they need to succeed.<br><br>We serve job seekers looking for employment in all areas and specialize in 3 fast growing industries of employment; culinary and hospitality, tech., and health and wellness. | hospitality, tech, health and wellness | https://www.ymcasf.org/programs?field_location_reference_target_id[]=392 |
| | Bayview Hunters Point and SE SF residents | Young Community Developers | Vocational training | job readiness and training programs, educational advancement, job placement services | YCD provides the residents of Bayview Hunters Point and San Francisco residents at large a variety of job readiness training programs and support services to facilitate educational advancement and job placement. The following is a list of services YCD offers:<br>GED/HS Diploma, CityBuild recruitment and referral, job placement assistance, Youth Employment Programs, Summer Work Experience Program, MYEEP, Career training and certification, Clean Streets, Job Readiness Training, D-10 Summer Academic Program, and more. YCD also serves as the SFOEWD Bayview Neighborhood Access Point. | Construction, green jobs | https://0391029.netsolhost.com/WordPress/what-we-do-2/ |
| | Bayview Hunters Point | T.U.R.F. | Case Management, and Employment Services | Case management, foundational competencies, career couseling and placement | Our case management program provides Restorative and Intensive case management services to roughly 30-40 youth and young adults ages 14-25 every year. Our employment services program provides teens and young adults with job readiness skills, resume building, career connections, and job placement. | No | https://www.newturfsf.org/programs |
| | Bayview Hunters Point | Renaissance Parents of Success | Youth job readiness and job placement prrograms, re-entry/ex-offender services | Job readiness training, case management, educational advancement | Renaissance Parents of Success (RPOS) programs' mission is to provide comprehensive services to low-income, at risk populations such as: foster/emancipated foster youth and adults, youth and adults who are involved or have been involved in the criminal justice system and low-income youth/adults who reside in Federally Subsidized Housing Developments.<br>Our program is designed to help these individuals become self-sufficient. We provide a safety net for individuals struggling to survive in a high risk community especially during these economically challenged times. | No | http://renaissanceparentsofsuccess.com/services |
| | Bayview Hunters Point | A. Phillip Randolph Institute SF | Internships Referral & Student Case Management, Youth Work Program | case management, placement services, training | Internships Referral & Student Case Management<br>APRISF recruits and provides placement services for summer internship programs such as Project Pull, MYEEP, and San Bruno Garden Project. Contact us for information regarding high school/college internship programs and available scholarships.Youth Work Program | No | http://www.aprisf.org/youth-chapter.html |
| | Central Market/Tenderloin | · SF Conservation Corps | Recycling Outreach Team, John Muir Charter HS, Apprenticeship Readiness Program | Sector training | Since 1983, over 5,000 young people have taken the challenge to become Corpsmembers, working 5 million hours on hundreds of landscaping, conservation, recycling and playground renovation projects to enhance the environment and communities of San Francisco. Throughout this work, thousands of Corpsmembers have gained academic, environmental and work skills. | Green Construction | https://www.sfcc.org/ |
| | Central Market/Tenderloin | United Playaz | Workforce Development | Foundational competencies, referral services, academic assistance | UP provides skill development and workforce training, academic assistance with the GED and HSE, as well as college enrollment services and referrals to vocational training and other employment programs. We ensure our kids that they will become self-sufficient adults. Currently, UP has assisted more than 100 kids who have completed their GED, enrolled in college, or completed vocational training. | No | http://unitedplayaz.org/our-work/ |
| | Central Market/Tenderloin | Vietnamese Youth Development Center | Youth Leadership Development; Employment Opportunities | Foumdational competencies, HS diplpoma completion, job counseling and training | Our Youth Leadership Development services offer unique opportunities for San Francisco refugees and immigrants to create change from within their own communities.<br>We provide one-on-one employment support and skill development, help with high school diplomas and GEDs, assist with college preparation, and provide opportunities for paid work experience. | No | http://www.vydc.org/services/community-and-family-programs |
| | Central Market/Tenderloin | Larkin Street Youth Services | Education and Employment Servicces | case management, foundational competencies, career couseling and placement services | We offer several levels of programming tailored to address this educational achievement gap, from GED tutoring to college success programs and everything in between.<br><br>To prepare young people for careers in key Bay Area sectors like technology and healthcare, our employment programs also fall on a spectrum, from introductory day-labor opportunities and basic job readiness classes to intensive, semester-long Learning Centers. | No | https://larkinstreetyouth.org/what-we-do/#section-education-employment |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Transitional Age Youth | Central Market/Tenderloin | Asian Neighborhood Design | Employment Training Center | Sector training, core competencies and education advancement services | For over 38 years, AND's Employment Training Center (ETC) has successfully trained at-risk, low-income youth and young adults in the green construction field to gain vital life and employment skills and achieve self-sufficiency. Each year, up to 60 graduates gain comprehensive skills in construction and carpentry, and receive basic education on topics such as history and mathematics, as well as high school equivalency or GED preparation. Our program also works to diversify the field of construction by including women and serves 90% people of color.<br><br>Through ETC, graduates obtain critical life skills (e.g., money management, communications and conflict resolution), build self-esteem and confidence, and develop real pathways out of poverty. | Green Construction | http://www.andnet.org/etc/ |
| | Chinatown | Wu Yee Children's Services | Early Childhood Education (ECE) Career Pathway Program | paid sector training | The Early Childhood Education (ECE) Career Pathway Program is a collaboration between Jewish Vocational Services (JVS), City College of San Francisco (CCSF), and Wu Yee Children's Services. This new exciting program is exclusively for parents between the ages 18-24 who have children connected to Wu Yee. Parents connect and/or reconnect to college Child Development (CDEV) classes at CCSF<br>65 hours of Internship experience at CCSF's CDEV Lab School<br>Obtain a CA Child Development Associate Teacher Permit, within an academic school year<br>50 days/3hrs per day of WBL (work based learning), internship coaching and experience at a Wu Yee Child Development Center<br>Earn up to $1,000 scholarship for completion of program | Childcare | https://www.wuyee.org/ece-career-pathway-program/ |
| | Chinatown, Richmond, Sunset | Community Youth Center – SF | The Mayor's Youth Employment and Education Program (MYEEP) | Foundational competencies | MYEEP is an organized collaborative of neighborhood based agencies that provide valuable subsidized work experience to San Francisco high school aged youth who face significant barriers to employment. As a collaborative non-profit organization, CYC MYEEP provide services to youth at 3 different neighborhoods in San Francisco: Richmond, Sunset, and Chinatown. | No | https://www.cycsf.org/component/workforce-development/ |
| | Downtown | Bridges from School to Work | Youth with Disabilities Program | case management, job training, placement, career counseling, and retention services. | The San Francisco offices of Bridges from School to Work matches youth with disabilities between the ages of 17 and 24 with entry-level job positions in local San Francisco area businesses that are seeking workforce diversification solutions. Delivered over a 15-24 month period by qualified staff, these component parts include skills assessment, career planning, job development, placement, evaluation, action planning and follow-up. | na | http://www.bridgestowork.org/locations/san-francisco/ |
| | Mission/ Potrero Hill | Good Samaritan Family Resource Center | Teen Promotores Program | Sector training | Through the Promotores program, teens are trained as community health workers who reach out to their peers to promote reproductive health education and pregnancy prevention. In addition to outreach, promotores hold workshops at organizations and schools in the community, and they provide youth with referrals to neighborhood teen clinics, such as Good Samaritan's Wolford Family Clinic. | Healthcare | http://goodsamfrc.org/youth-services-program/ |
| | Mission | HOMEY | IMPACT Program | Workforce training | HOMEY's IMPACT Program is designed to teach work readiness skills, inspire character development, and positive life skills, to its participants. While at HOMEY, participants go through a 8-week course that focuses on: work preparation, communication, life management, goal setting, positive decision-making, interviewing, and other skills. | No | https://www.homey-sf.org/impact-program.html |
| | OMI/ Excelsior | Urban Services YMCA/ OMI/Excelsior Beacon Center | Empowerment to Employment | Workforce training, counseling and placement | As an E2E participant, you will receive six weeks of professional development training as well as continuous support throughout the program. Upon completing six weeks of training, you will receive a $400 stipend. Within one month of completing training, you will be placed at a job site for a minimum of three months. You will earn $15 per hour. | Nonprofit support, construction, afterschool and social services support, hospitality | https://www.ymcasf.org/programs/empowerment-employment-e2e |
| | Potrero Hill | Potrero Hill Neighborhood House | Transitional Age Youth Program, Experiment in Diversity Program (EID) | Case management, core competencies development, career exposure | Our program is designed to be robust and relevant to the real world, building the knowledge and skills that our young people need for success in college and careers. We will visit local businesses and colleges, and invite speakers in to share their stories and experiences. The youth will also explore personal identity and cultural diversity and engage in community service projects. This well - balanced program is designed to include both work and play, as students are rewarded with field trips to theme parks around the bay area, and monetary awards for a job well done. | No | https://www.phnhsf.org/mentoring-programs |
| | Richmond | Community Youth Center – SF | Job Readiness for English Language Learners (JRELL); | VESL, career navigation | JRELL provides youth, ages 14-18, who are primarily immigrant English Language Learners with a workforce program that focuses on removing barriers to employment through a skills building curriculum and workplace experience to ensure they are ready and prepared to succeed in school, work and life. Program participants receive 40 hours of job readiness training/career exploration workshops and later placed at a work site that matches youth's interests for over 80 hours of work experience. | No | https://www.cycsf.org/component/workforce-development/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
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| Transitional Age Youth | South of Market and Bayview Hunters Point | Five Keys Charter School | Assessment and Education Placement Program; IPO Program; | workforce training, career counseling and case management | coordinates assessment and educational placement services for Workforce providers throughout the City and County of San Francisco. Five Keys provides education assessment for clients at several workforce training programs including the Ramp youth program at Goodwill, the Vietnamese Youth Development Center and many other WIA access points. Five Keys provides intensive and comprehensive education intervention, vocational planning, and academic case management for IPO participants. Services are delivered on-site at the IPO host sites (Arriba Juntos and Young Community Developers) and at the transitional employment worksite. | No | https://www.fiveekeyscharter.org/programs/ |
| | (mostly) Southeast SF | Mission Neighborhood Centers | Summer Youth Employment Program; Interrupt, Predict, Organize (IPO) Youth Violence Prevention Program; Young Adult Year Round PRogram; Bio-regional Habitat Restoration (BHR) & Environmental Construction | Sector training | and young adults, ages 16-24 with first-time work experiences while preparing them to enter into a job of their choice and for jobs in construction and the green & clean economy. Most of our participants come from the city's southeast sector and are at the highest risk of dropping out of school and/or are at risk of gang and criminal involvement. The programs are provided in partnership with SFDPW, Office of the Mayor, Laborers Training Center of Northern California, SFPUC, and Recology Sunset Scavenger. The program trains for positions as environmental service worker pre-trainee. | Green Construction | http://mncsf.org/home/workforce-development/ |
| | Sunset | Sunset Youth Services | Digital Technology programs, case management, and foundational skilsl training | Workforce training, career counseling and case management | In our Digital Arts Program, youth get access to and training in digital audio and film production, so they can express themselves, learn marketable skills, tell their stories, and build confidence in themselves and their work. UpStar Records is our youth-run record label aimed at turning today's hip hop enthusiasts into tomorrow's digital technology leaders. young adults receive case management and services including life skills workshops, financial literacy, resume writing, assistance in accessing healthcare, and educational support. | IT | http://sunsetyouthservices.org/programs/ |
| | Western Addition | Success Center San Francisco | Young Adult Worklink Access Point, New Directors, SF Summer Jobs+ Program | Workforce training, career counseling and placement, foundational competencies | Young Adult WorkLink framework priorities linkages for young adults that help them build skills they need to necessary to achieve economic self-sufficiency and serves as a point of entry into both public and private education and workforce systems. The SCSF Access Point connects nearly 200 youth per year into educational and workforce related services.The New Directions program New Directions offers a four month sequence of classes, provided daily in conjunction with the Early Morning Study Academy. Upon completion, youth work individually with a job coach who helps them identify their career interests, identify potential employers, prepare for interviews, and provides follow-up support to address any on-the-job issues. New Directions works with over 150 youth each year, of whom 70% are successfully placed in employment or workforce training. As partner of United Way of the Bay Area, Success Center SF provides assessment and job ready skills training and supports young adults transition into private sector jobs with companies like Starbucks, Old Navy, Mahoney Security, WholeFoods and Ghirardelli. The Success Center serves as the SFOEWD Western Addition Neighborhood Access Point. | No | http://successcentersf.org/programs-services/youth-jobs/ |
| | Western Addition | Magic Zone | Transitional Age Youth Program | case management, workforce counseling, training, assessment, and connection | Our program is designed to meet each individual where they are. After a detailed intake the clients are assessed on whether they are job ready or need more work in order to be placed in a job. Those who are job ready receive weekly one on ones to search, apply and make connections with jobs they may be interested in. Those who are deemed "need more work" are mandated to attend job readiness workshops and are then placed in a paid internship where they can gain on the job experience and valuable skills that would make them more marketable to the workforce. The needs around the individuals stability will be addressed through intensive case management and will be measured utilizing the SMART goals established during the intake to track the clients progress weekly. | No | http://www.collectiveimpact.org/magic-zone.html |
| | Western Addition | Hearing and Speech Center | Career Step Program Employment Counseling & Placement | career counseling, training, foundational capacities, and job placement services, retention services | The Career Steps program serves Deaf and Hard-of-Hearing youth ages 18-24 in San Francisco through a curriculum including individual counseling, group workshops, and career experience, using ASL and teaching methods appropriate for people with hearing loss. We partner with established employment agencies in San Francisco to increase work site opportunities for people with disabilities.<br><br>We also provide individualized employment counseling for Deaf and Hard-of-Hearing adults. Our employment specialist will help you determine the type of jobs you're interested in, develop your interview and resume-writing skills, and work with you throughout the search, application, and interview processes. We also provide continuing support after a successful job placement, to ensure success in the new position and work through any issues or frustrations that come up. | No | https://www.hearingspeech.org/services/education-counseling-programs/programs-for-adults/ |

| Examples of San Francisco Workforce Development Programs for Vulnerable Populations | | | | | | | |
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| **Target Population** | **Neighborhood** | **Organization** | **Workforce Program(s)** | **Program Services** | **Program Description** | **Training for Specific Industry?** | **Website** |
| Survivors of domestic violence | Mission | Asian Women's Shelter | Shelter Programs such as SEED Program, Case Management, Ngoc Thi Pham Fund | Case management, education support, career counseling, training, and navigation, support services | A resident of AWS is provided with:Coordination of support services such as legal advocacy and assistance, transportation, counseling, training/employment, and mentoring, Follow-up services, including resources to establish permanent or transitional housing. The Pham Fund is an annual scholarship fund for past, current, and future residents at AWS to support school supplies, textbooks, tuition, and other education-related expenses. Also in collaboration with Narika, provided 12-week SEED program to former residents to foster economic independence and integration into society through the development of English language skills, financial literacy, computer literacy, and career skills that contribute to personal and professional growth; | No | http://www.sfaws.org/programs/direct-services.aspx |
| | | | | | | No | |
| Homeless or at risk of homelessness | Central Market/Tenderloin | Episcopal Community Services of San Francisco | Adult Education Center | Foundational competencies, HS diploma completion, job counseling and training | The Adult Education Center specializes in providing a stable, caring and individualized learning environment for students who are coping with the inter-related challenges of homelessness, illiteracy, learning disabilities, substance abuse, and mental health issues.<br><br>While created particularly for homeless adults and formerly homeless adults now living in supportive housing, the Adult Education Center is open to all low-income individuals in San Francisco who would like to further develop their academic skills, or who need job counseling, training, and placement assistance | No | http://www.ecs-sf.org/programs/skills.html |
| | Central Market/Tenderloin | Community Housing Partnership | Solutions SF | sector training, career counseling, and placement | program. Employment training, community organizing, environmental awareness internship, substance use management/cessation referrals. Solutions SF:<br><br>places individuals in transitional lobby staff jobs<br>provides supported employment with counseling for up to 15 months<br>pays market-rate wages and offers health benefits<br>provides on-the-job training and prepares employees for permanent positions<br>places employees in full-time external employment<br>delivers high quality lobby staffing services to its clients | Hospitality | https://www.chp-sf.org/housing-services/solutions-sf/ |
| | Central Market/Tenderloin | Goodwill Industries | Homeless employment Collaborative | Job training and foundational competencies | Classroom training for Office Technology and transitional employment. Intensive job readiness training, resume writing, mock<br>interviews, and computer classes. Goodwill Career Center also serves as an SFOEWD Comprehensive Access Point. | No | https://sfgoodwill.org/jobs/employer-services/ |
| | Central Market/Tenderloin | Swords to Plowshares | Employment and Training Program | job preparation, search, and placement services | Job search/job preparation services and<br>direct placement program. | NA | http://www.cjcj.org/uploads/cjcj/documents/hecflyerfinalf1.pdf |
| | Central Market/Tenderloin | Downtown Streets Team | | Transitional Job, employment placement and referral | Each Team consists of 224 Team Members that help clean and beautify the Central Market and Union Square area. In a little more than three months, we have successfully found 12 people employment and removed over 75,000 gallons of debris from the city's streets, as well as 2,921 used needles. Thanks to financial backing from local tech companies like Dolby, our homeless folks are currently beautifying the areas of Civic Center, UN Plaza, and to meet the demands of over 35 eager waitlisted Team Members, we'll be expanding to Union Square. | Custodial | http://streetsteam.org/san-francisco |
| | Central Market/Tenderloin | Hospitality House | Employment Program | Case management, job training, counseling, and placement | Through on-site employment resource centers, case managers provide support for job seekers to open email accounts, send faxes, search for jobs, write resumes, obtain work clothing and tools, and build job retention skills that support maintaining employment and furthering their career goals. | No | http://hospitalityhouse.org/employment-program/ |
| | Central Market/Tenderloin | Center on Juvenile and Criminal Justice | Juvenile justice services, criminal justice services, San Francisco Training Partnership | Case management, foundational competencies, Job preparation and placement services | Juvenile Justice services such as the Community Options for Youth (COY), Legal Education Advocacy Program, Juvenile Collaborative Reentry Unit (JCRU), Wraparound Program, and Youth Justice Mentoring Program. In addition, Criminal Justice Services include tje Federal Reentry Project, San Francisco Training Partnership, No Violence Alliance. | No | http://www.cjcj.org/Direct-services.html |
| | Central Market/Tenderloin | Cityteam San Francisco | Learning & Career Center | Core competencies training, resume and job interview training, career counseling and service connection | Men in our residential programs attend the learning center in order to gain knowledge and increase employability. The level of education for each student varies immensely as some never completed elementary school and others have graduated from college. Each student has an individualized learning plan and learns at their own pace as they master skills in writing, math, reading, comprehension, and computer literacy. Life skills are an important element of the learning and career center which ensure students know how to make and keep a budget, write a resume, and interview for a job. We also provide business clothes for interviews. | No | https://www.cityteam.org/san-francisco/programs/ |

| Examples of San Francisco Workforce Development Programs for Vulnerable Populations | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Target Population** | **Neighborhood** | **Organization** | **Workforce Program(s)** | **Program Services** | **Program Description** | **Training for Specific Industry?** | **Website** |
| Homeless or at risk of homelessness | Central Market, Panhandle | Hamilton Families | Hamilton Housing Solutions | cas management, job search assisstance | Hamilton Housing Solutions prevents homelessness whenever possible and assists families who have become homeless with housing search assistance, temporary rent assistance, case management, job search and other services for up to 18 months to help them find and retain a permanent home. | No | https://hamiltonfamilies.org/what-we-do/housing-solutions/ |
| | Downtown | Toolworks, Inc | | on-the-job sector paid trainings and intersnships; case management, placement and retention services | On-the-Job Training (OJT). Paid training in skilled trades: custodial; building maintenance; recycling. Intensive case management/resource management; placement and retention support. | custodial, construction, green construction | http://www.cjcj.org/uploads/cjcj/documents/hecflyerfinalf1.pdf |
| | Mission | Arriba Juntos | Office Skills Training | Job training, search, and direct placement | Classroom training for automated office skills. Work readiness, job search and direct placement. | No | http://www.cjcj.org/uploads/cjcj/documents/hecflyerfinalf1.pdf |
| | Mission | St. Joseph's Family Center, Cathollic Charities CYO | | Case management, job training, counseling, foundational skills development | Employment case management, career development support, and job placement assistance. Cover letter & resume writing, interview preparation, networking, linked-in, cyber-job seeking support, job retention skills. | No | http://www.cjcj.org/uploads/cjcj/documents/hecflyerfinalf1.pdf |
| | Mission | Mission Hiring Hall | Homeless Employment Collaborative, San Francisco Training Partnership | Job preparation and placement services | Job search/job preparation services and direct placement program. Trainings offered, Construction Trades and Office plus STEPS (Security Guard Card) | Construction, office, security | http://missionhiringhall.org/jobseekers/ |
| Re-entry | Central Market/Tenderloin | Center on Juvenile and Criminal Justice | Juvenile justice services, criminal justice services, San Francisco Training Partnership | Case management, foundational competencies, Job preparation and placement services | Juvenile Justice services such as the Community Options for Youth (COY), Legal Education Advocacy Program, Juvenile Collaborative Reentry Unit (JCRU), Wraparound Program, and Youth Justice Mentoring Program. In addition, Criminal Justice Services include tje Federal Reentry Project, San Francisco Training Partnership, No Violence Alliance. | No | http://www.cjcj.org/Direct-services.html |
| | Downtown | America Works of California, Inc | | Job training, career counselnig and assistance, retention services | America Works provides job readiness training, career counseling and job search assistance, interview preparation, and retention services to people of all background. America Works is an SFOEWD Specialized Access Point for individuals involved with the criminal justice system. | No | http://americaworks.com/california/ |
| | Mission | Five Keys Charter School | Reentry Services at the Women's Resource Center | Foundational competencies, HS diploma completion, case management and counseling | The goal of these combined services is a client-centered, relational, and gender-specific approach to addressing the needs of women transitioning into the community after incarceration. Examples of desired activities include: (1) Intensive Case Management, (2) Gender-specific and Responsive Programming | NA | https://www.fivekeyscharter.org/programs/ |
| | Potrero Hill | Potrero Hill Neighborhood House | First Choice Program | Case management, anager management classes, core competencies development | Through intensive case management, anger management and life skill education, the First Choice program will assist in guiding some of the hardest to serve juvenile offenders on the difficult path of reentry. | No | https://www.phnhsf.org/mentoring-programs |
| Veterans | Central Market/Tenderloin | Swords to Plowshares | Employment and Training Program | job placement, career counseling, vocational training | At Swords to Plowshares, veterans work one-on-one with our Employment & Training Program staff to address their individual needs, overcome obstacles to employment, and determine a long-term career plan. We provide job placement assistance and vocational training programs to help veterans translate their skills and train for new careers in high-growth, high-wage careers in the civilian sector. Swords to Plowshares serve as an SFOEWD Specialized Access Point for Veterans. | NA | https://www.swords-to-plowshares.org/employment-training/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Public Housing Residents | Bayview Hunters Point | Bayview Hunters Point YMCA | Primed & Prepped Culinary Arts Program, Workforce Development & Transitional Age Youth PRogram | Sector training, case management, job placement services | Primed & Prepped is designed to support youth of color, ages 14-19, to develop culinary skills and be placed in internships and jobs. This program is a gateway to higher education and entry level jobs in the hospitality and culinary arts industry. It prepares students for entry level positions as bus boys, dishwashers, line and prep cooks.The Bayview YMCA Workforce Development & Transitional Age Youth Program helps job seekers transition to become self-sufficient adults by providing workshops and case-management through strength based, restorative approaches. We combine case management with wrap around services and support to provide members with the skills and resiliency they need to succeed. | hospitality, tech, health and wellness | https://www.ymcasf.org/programs?field_location_reference_target_id[]=392 |
| | Bayview Hunters Point and SE SF residents | Young Community Developers | Vocational training | job readiness and training programs, educational advancement, job placement services | YCD provides the residents of Bayview Hunters Point and San Francisco residents at large a variety of job readiness training programs and support services to facilitate educational advancement and job placement. The following is a list of services YCD offers:<br>GED/HS Diploma, CityBuild recruitment and referral, job placement assistance, Youth Employment Programs, Summer Work Experience Program, MYEEP, Career training and certification, Clean Streets, Job Readiness Training, D-10 Summer Academic Program, and more. YCD also serves as the SFOEWD Bayview Neighborhood Access Point. | Construction, green jobs | https://0391029.netsolhost.com/WordPress/what-we-do-2/ |
| | Bayview Hunters Point | Urban Strategies | | Service connection | At Alice Griffith, the Urban Strategies team continues to link residents with senior programs, family support programming, youth and education programming, afterschool activities, health and wellness activities, and workforce development opportunities. | | http://urbanstrategiesinc.org/ |
| | Bayview Hunters Point | A Phillip Randolph Institute San Francisco | CityBuild and HOPE SF construction training programs | Service connection, case management, training | APRISF community outreach services are designed to target qualified Bayview-Hunters Point (BVHP) residents, inform and engage community members in the employment opportunities related to the project, based on a hiring criteria defined by the Mayor's Office of Housing HOPE-SF. Employment services include conducting employment orientations, assessing candidates to determine if they meet the minimum qualifications for employment opportunities on the Hunters View Development Project; and provide case management services.<br><br>In addition, APRI provides CityBuild referral database of qualified young adults, ages 18-24, for admission to the CityBuild Academy and Construction Administration Training Program. | Construction | http://www.aprisf.org/workforce-development.html |
| | Chinatown | APA Family Support Services | Employment Support and Workforce Development Program | Service Connection, Job search, resume, and interview training services | We offer employment support services in all of our locations. Services provided include: Resume building; Interview Skills; Job Searching; Referral to appropriate English as a Second Language classes; Access to internet, computer, printer and fax<br>Individuals are invited to make appointments with our Employment Specialists for a basic assessment.<br>Once the assessment has been made, goals and a plan of action are set. | | http://www.apafss.org/employment-support.html |
| | Mission | Catholic Charities | Homelessness and housing services, refugee and immigrant services | Case management and vocational support services, foundational competencies training | | NA | https://catholiccharitiessf.org/our-programs/#5 |
| | Potrero Hill | BRIDGE REgional Partners, Inc | Adult programs ranging from ESL to resume workshops and financial literacy | Service connection | At Potrero Annex/Terrace, Bridge Housing continues to provide community building activities and foster individual participation in planning sessions. These activities included leadership development and safety workshops, healthy living and healthy generations groups, gardening/sustainability programs, social activities, and a service connection contract with the Potrero Hill Family support Center (Urban Services YMCA) in which they work with residents to assess, connect and support them in workforce and educational opportunities. | | https://bridgehousing.com/what-we-do/resident-community-services/ |
| | Visitacion Valley | Mercy Housing California | | Service connection | At Sunnydale, Mercy Housing, the Bayview YMCA, APA/Visitation Valley Strong Famlies, and TURF work collaboratively to provide outreach, family support, service connections, health and wellness, and educational activities and community convenings to Sunnydale residents. | | |
| | Visitacion Valley | FACES SF/ Visitacion Valley Neighborhood Access Point | Job readiness traiining, job search, placement and retention services, referral services, and career advising | | Since 2004 our Workforce Program has been assisting San Franciscans and Bay Area residents in acquiring the skills they need to enter the workforce or advance their careers. Our program is located in Visitacion Valley and we strive to bridge the gap between the job seeker and local companies looking for qualified candidates. We provide resume assistance, job search workshops, computer access, job leads, and scheduled hiring events and job fairs. FACES SF has language capacity in English, Spanish, and Mandarin and Cantonese. FACES also serves as the SFOEWD Visitacion Valley Neighborhood Access Point. | No | https://facessf.org/programs/workforce/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Disconnected LGBT population | Castro | LYRIC | Youth Workforce Development Program | Foundational competencies, paid placement services and counseling | LYRIC's Youth Workforce Development Program offers paid opportunities for work placement (youth ages 14-17) as well as one-on-one support to youth job seekers (24 and younger). | NA | http://lyric.org/workforce-development/# |
| | Central Market/Tenderloin | Larkin Street Youth Services | Case Management | case management, foundational competencies, career couseling and placement services | Castro Youth Housing Initiative (CYHI): a two-year scattered-site housing program for young people who identify as LGBTQ. | No | https://larkinstreetyouth.org/what-we-do/#section-education-employment |
| | Mission | Dolores Street Comunity Servces | Dolores Shelter Program | case management | The Dolores Shelter Program provides emergency shelter and meal service to dozens of individuals every night. The majority of shelter guests are recent immigrants from Latin America, and many work as day-laborers. One of the primary goals of the program is to prevent newly-homeless individuals from falling into the cycle of long-term homelessness. Our case management services, combined with the small size and community-based nature of the shelters help us to meet that goal. The program recently added 24 additional beds, specifically targeted as a safe | No | https://www.dscs.org/housing/ |
| Disconnected African Amercian | Bayview Hunters Point and SE SF residents | Young Community Developers | Vocational training | job readiness and training programs, educational advancement, job placement services | YCD provides the residents of Bayview Hunters Point and San Francisco residents at large a variety of job readiness training programs and support services to facilitate educational advancement and job placement. | Construction, green jobs | https://0391029.netsolhost.com/WordPress/what-we-do-2/ |
| | Bayview Hunters Point | Urban Strategies | | Service connection | At Alice Griffith, the Urban Strategies team continues to link residents with senior programs, family support programming, youth and education programming, afterschool activities, health and wellness activities, and workforce development opportunities | | http://urbanstrategiesinc.org/ |
| | Bayview Hunters Point | Bayview Hunters Point YMCA | Primed & Prepped Culinary Arts Program, Workforce Development & Transitional Age Youth PRogram | Sector training, case management, job placement services | Primed & Prepped is designed to support youth of color, ages 14-19, to develop culinary skills and be placed in internships and jobs. This program is a gateway to higher education and entry level jobs in the hospitality and culinary arts industry. It prepares students for entry level positions as bus boys, dishwashers, line and prep cooks. The Bayview YMCA Workforce Development & Transitional Age Youth Program helps job seekers transition to become self-sufficient adults by providing workshops and case-management through strength based, restorative approaches. We combine case management with wrap around services and | hospitality, tech, health and wellness | https://www.ymcasf.org/programs?field_location_reference_target_id[]=392 |
| | Bayview Hunters Point | T.U.R.F. | Case Management, and Employment Services | Case management, foundational competencies, career couseling and placement | Our case management program provides Restorative and Intensive case management services to roughly 30-40 youth and young adults ages 14-25 every year. Our employment services program provides teens and young adults with job readiness skills, resume building, career connections, and job placement. | No | https://www.newturfsf.org/programs |
| | Bayview Hunters Point | Renaissance Parents of Success | Youth job readiness and job placement prrograms, re-entry/ex-offender services | Job readiness training, case management, educational advancement | Renaissance Parents of Success (RPOS) programs' mission is to provide comprehensive services to low-income, at risk populations such as: foster/emancipated foster youth and adults, youth and adults who are involved or have been involved in the criminal justice system and low-income youth/adults who reside in Federally Subsidized Housing Developments. | No | http://renaissanceparentsofsuccess.com/services |
| | Bayview Hunters Point | A. Phillip Randolph Institute SF | Internships Referral & Student Case Management, Youth Work Program | case management, placement services, training | APRISF recruits and provides placement services for summer internship programs such as Project Pull, MYEEP, and San Bruno Garden Project. Contact us for information regarding high school/college internship programs and available scholarships.Youth Work Program | No | http://www.aprisf.org/youth-chapter.html |
| | Central Market/Tenderloin | SF Conservation Corps | Recycling Outreach Team, John Muir Charter HS, Apprenticeship Readiness Program | Sector training | Since 1983, over 5,000 young people have taken the challenge to become Corpsmembers, working 5 million hours on hundreds of landscaping, conservation, recycling and playground renovation projects to enhance the environment and communities of San Francisco. Throughout this work, thousands of Corpsmembers have gained academic, environmental and work skills. | Green Construction | https://www.sfcc.org/ |
| | South of Market and Bayview Hunters Point | Five Keys Charter School | Assessment and Education Placement Program; IPO Program; | workforce training, career counseling and case management | coordinates assessment and educational placement services for Workforce providers throughout the City and County of San Francisco. Five Keys provides education assessment for clients at several workforce training programs including the Ramp youth program at Goodwill, the Vietnamese Youth Development Center and many other WIA access points. Five Keys provides intensive and comprehensive education intervention, vocational planning, and academic case management for IPO participants. Services are delivered on-site at the IPO host sites (Arriba Juntos and Young Community Developers) and at the transitional employment worksite. | No | https://www.fivekeyscharter.org/programs/ |
| | Visitacion Valley | FACES SF/ Visitacion Valley Neighborhood Access Point | Job readiness traiining, job search, placement and retention services, referral services, and career advising | | Since 2004 our Workforce Program has been assisting San Franciscans and Bay Area residents in acquiring the skills they need to enter the workforce or advance their careers. Our program is located in Visitacion Valley and we strive to bridge the gap between the job seeker and local companies looking for qualified candidates. We provide resume assistance, job search workshops, computer access, job leads, and scheduled hiring events and job fairs. FACES SF has language capacity in English, Spanish, and Mandarin and Cantonese. FACES also serves as the SFOEWD Visitacion Valley Neighborhood Access Point. | No | https://facessf.org/programs/workforce/ |

## Examples of San Francisco Workforce Development Programs for Vulnerable Populations

| Target Population | Neighborhood | Organization | Workforce Program(s) | Program Services | Program Description | Training for Specific Industry? | Website |
|---|---|---|---|---|---|---|---|
| Disconnected Native American | Central Market/Tenderloin | Native American Health Center | Youth Services | Case management, leadership development, core competencies and educational advancement services, job | Native American Health Center's mission is to provide comprehensive services to improve the health and well-being of American Indians, Alaska Natives, and residents of the surrounding communities, with respect for cultural and linguistic differences. | No | http://www.nativehealth.org/content/youth-services |
| | Mission | Friendship House Association of American Indians | Education, Self-Empowerment Skills | Case Mgmt, service connection, foundational competencies, job training | educational placement and high school or GED completion classes through Five Keys Charter School. Clients gain access to resume development, computer training, job training, life skills development, and housing assistance to make a successful reentry back into the community.I | No | https://www.friendshiphousesf.org/index-test |
| Sector Training Programs for Vulnerable Populations | Bayview Hunters Point | Bayview Hunters Point YMCA | Primed & Prepped Culinary Arts Program, Workforce Development & Transitional Age Youth PRogram | Sector training, case management, job placement services | Primed & Prepped is designed to support youth of color, ages 14-19, to develop culinary skills and be placed in internships and jobs. This program is a gateway to higher education and entry level jobs in the hospitality and culinary arts industry. It prepares students for entry level positions as bus boys, dishwashers, line and prep cooks.<br>Our students have internships at Intercontinental Hotel, Fairmont Hotel, Marriott Hotel, Sears Fine Food and Lori's Diner. The Bayview YMCA Workforce Development & Transitional Age Youth Program helps job seekers transition to become self-sufficient adults by providing workshops and case-management through strength based, restorative approaches. We combine case management with wrap around services and support to provide members with the skills and resiliency they need to succeed. | hospitality, tech, health and wellness | https://www.ymcasf.org/programs?field_location_reference_target_id[]=392 |
| | Bayview Hunters Point and SE SF residents | Young Community Developers | Vocational training | job readiness and training programs, educational advancement, job placement services | YCD provides the residents of Bayview Hunters Point and San Francisco residents at large a variety of job readiness training programs and support services to facilitate educational advancement and job placement. The following is a list of services YCD offers:<br><br>GED/HS Diploma, CityBuild recruitment and referral, job placement assistance, Youth Employment Programs, Summer Work Experience Program, MYEEP, Career training and certification, Clean Streets, Job Readiness Training, D-10 | Construction, green jobs | https://0391029.netsolhost.com/WordPress/what-we-do-2/ |
| | Bayview Hunters Point | A Phillip Randolph Institute San Francisco | CityBuild and HOPE SF construction training programs | Service connection, case management, training | APRISF community outreach services are designed to target qualified Bayview-Hunters Point (BVHP) residents, inform and engage community members in the employment opportunities related to the project, based on a hiring criteria defined by the Mayor's Office of Housing HOPE-SF . Employment services include conducting employment orientations, assessing candidates to determine if they meet the minimum qualifications for employment opportunities on the Hunters View Development Project; and provide case management services.<br><br>In addition, APRI provides CityBuild referral database of qualified | Construction | http://www.aprisf.org/workforce-development.html |
| | Central Market/Tenderloin | Asian Neighborhood Design | Employment Training Center, First Impressions | Sector training, core competencies and education advancement services | For over 38 years, AND's Employment Training Center (ETC) has successfully trained at-risk, low-income youth and young adults in the green construction field to gain vital life and employment skills and achieve self-sufficiency. Each year, up to 60 graduates gain comprehensive skills in construction and carpentry, and receive basic education on topics such as history and mathematics, as well as high school equivalency or GED preparation. Our program also works to diversify the field of construction by including women and serves 90% people of color.<br><br>The First Impressions Project (FIP) aims at changing the impression San Francisco consumers have of their mental health | Green Construction | http://www.andnet.org/our_work/ |
| | Central Market/Tenderloin | Code Tenderloin | Job Readiness + Interview Course, Code Ramp | Wrap-around services, sector training | Code Tenderloin Interview Course is a 4 weeks course focused on soft skills development. Code Ramp is a 5 week/60 hour course in partnership with coding school Hack Reactor, our students learn front-end web development (HTML, CSS, Javascript) from expert software developers from local tech companies hosted at WeWork.<br><br>Students interested in further education/training are prepared to go on to a City-funded program called TechSF for fast-track certifications. Code Tenderloin works with community orgs | IT | http://www.codetenderloin.com/#mission |
| | Central Market/Tenderloin | The Arc of San Francisco | Adult Life & Skills program, Continuing Ed & Employment | foundational competencies, job training, assessment | Employment minded individuals or those with Career Certificates receive individual career assessments, job training and placement plus ongoing coaching and career development for both part-time | Administration, IT, hospitality | http://www.thearcsf.org/ |
| | Chinatown | Chinese Progressive Association | Hospitality and Vocational Training Program | VESL, job training, foundational competencies | The Hospitality and Vocational Training (HVT) program was started in 2006 in partnership with the City College of San Francisco's ESL program and Chinese for Affirmative Action. Through the program, participants study vocational English, learn | Hospitality | http://www.cpasf.org/node/590 |
| | Chinatown | Chinese for Affirmative Action | Employment Services | service connection and referral | CAA places hundreds of primarily immigrant jobseekers in construction and hospitality work, as well as vocational training programs. Our support includes general assistance, client advocacy, and information and referral work. Special efforts are made to reach dislocated garment workers and to improve access to opportunities in the construction trades. CAA serves as an | Construction and hospitality | http://www.caasf.org/what-we-do/community-building/ |

| Examples of San Francisco Workforce Development Programs for Vulnerable Populations | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Target Population** | **Neighborhood** | **Organization** | **Workforce Program(s)** | **Program Services** | **Program Description** | **Training for Specific Industry?** | **Website** |
| Sector Training Programs for Vulnerable Populations | Chinatown | Wu Yee Children's Services | Early Childhood Education (ECE) Career Pathway Program | paid sector training | The Early Childhood Education (ECE) Career Pathway Program is a collaboration between Jewish Vocational Services (JVS), City College of San Francisco (CCSF), and Wu Yee Children's Services. This new exciting program is exclusively for parents between the ages 18-24 who have children connected to Wu Yee. Parents connect and/or reconnect to college Child Development (CDEV) classes at CCSF<br>65 hours of Internship experience at CCSF's CDEV Lab School<br>Obtain a CA Child Development Associate Teacher Permit, within an academic school year<br>50 days/3hrs per day of WBL (work based learning), internship coaching and experience at a Wu Yee Child Development Center | Childcare | https://www.wuyee.org/ece-career-pathway-program/ |
| | Central Market/Tenderloin | Community Housing Partnership | Solutions SF | sector training, career counseling, and placement | Job search/job preparation services and direct placement program. Employment training, community organizing, environmental awareness internship, substance use management/cessation referrals. Solutions SF:<br><br>places individuals in transitional lobby staff jobs<br>provides supported employment with counseling for up to 15 months<br>pays market-rate wages and offers health benefits<br>provides on-the-job training and prepares employees for permanent positions | Hospitality | https://www.chp-sf.org/housing-services/solutions-sf/ |
| | Downtown | Jewish Vocational Services (JVS) | Sector-Based Training | job training and referral/ placement services | JVS is a nonprofit that offers free sector-based training programs in the healthcare, financial services, and technology sectors. | healthcare, financial services, technology | https://www.jvs.org |
| | Downtown | Toolworks | Programs for people with developmental disabilities amd Deaf and hard-of-hearing individuals | case management, job training, retention services, placement support, coaching and counseling | Toolworks uses the highly successful Project SEARCH model of internship and training for people with disabilities. We identify tasks and departments most suited to the abilities of the individuals we serve, and provide an on-site trainer as interns work through their rotations. Classroom instruction develops worksite proficiencies and the soft skills needed to be successful in employment.<br><br>Internship and training programs provide you with a way to increase your pool of qualified applicants as well as demonstrate | Janitorial, hospitality, green sector | https://www.toolworks.org/people/training-employment |
| | Financial District, Chinatown, South of Market, Richmond, West Portal, Sunset, and Visitacion Valley | Self Help for the Elderly | Employment Training and Economic Development Department | Sector job training, counseling, placement and retention service, | The employment training and economic development department (ETED) creates and provides training, counseling, employment, and job retention for adults of all ages. Our Senior Community Service Employment Program (SCSEP) refers eligible participants to job training programs such as caregiver or custodial, or on-the-job training at nonprofit host agencies. Our purpose is to enhance their independence, self-esteem, and quality of life. We combat poverty by supporting older and displaced workers through each step of the job seeking process from training and counseling to job placement and retention. | Home health aid training, custodial, culinary, and on-the-job training at nonprofit host agencies | https://www.selfhelpelderly.org/our-services/employment-services/job-placements-and-employment-training |
| | Mission | Ariba Juntos | Health Career programs | Sector job training | Certified Nurse Assitant/Home Health Aid (CNA/CHHA) training program designed to prepare students to provide health services for patients in long-term care facilities, hospitals, and private homes. The Homecare Training Program prepares students to become caregivers and provide support to seniors or incapacitated individuals. | healthcare | http://www.arribajuntos.org/programs/health-careers |
| | Mission | MEDA | Sector-Based Training | career counseling and assessment, readiness training, job placement and retention services | MEDA exclusively offers three training programs that are designed to provide entry points into the retail, financial and technology sectors. The Mission Techies program teaches participants 18 years and older IT essentials of hardware, software, networking and coding, plus how to provide tech support to low-income families. The Mission Admins program is a six week adult training program that provides job training to become administration professionals. All programs provide job-readiness training, professional skills, ongoing placement, retention services, college prep and knowledge of how to enroll in post-secondary education | IT, administration | http://medasf.org/ |
| | Mission | Mission Language Vocational School | Medical Assisting; Culinary Arts; Professional Baking; Restaurant | VESL; sector training | 36 week medical assisting program available to both native and ESL speakers. MLVS groups students into programmatic tracts depending on students' capabilities, interests and acuity. These tracks are Medical Assisting Administrative, Medical Assisting | Healthcare and hospitality | http://mlvschool.org/our-programs/ |
| | Mission | Mission Hiring Hall | Homeless Employment Collaborative, San Francisco Training Partnership | Job preparation and placement services | Job search/job preparation services and direct placement program. Trainings offered, Construction Trades and Office plus STEPS (Security Guard Card) | Construction, office, security | http://missionhiringhall.org/jobseekers/ |
| | Mission/ Potrero Hill | Good Samaritan Family Resource Center | Teen Promotores Program | Sector training | Through the Promotores program, teens are trained as community health workers who reach out to their peers to promote reproductive health education and pregnancy prevention. In addition to outreach, promotores hold workshops at organizations and schools in the community, and they provide youth with referrals to neighborhood teen clinics, such as Good Samaritan's Wolford Family Clinic. | Healthcare | http://goodsamfrc.org/youth-services-program/ |

| Examples of San Francisco Workforce Development Programs for Vulnerable Populations | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Target Population** | **Neighborhood** | **Organization** | **Workforce Program(s)** | **Program Services** | **Program Description** | **Training for Specific Industry?** | **Website** |
| Sector Training Programs for Vulnerable Populations | (mostly) Southeast SF | Mission Neighborhood Centers | Summer Youth Employment Program; Interrupt, Predict, Organize (IPO) Youth Violence Prevention Program; Young Adult Year Round PRogram; Bio-regional Habitat Restoration (BHR) & Environmental | Sector training | Workforce Development programs provide San Francisco's youth and young adults, ages 16-24 with first-time work experiences while preparing them to enter into a job of their choice and for jobs in construction and the green & clean economy. Most of our participants come from the city's southeast sector and are at the highest risk of dropping out of school and/or are at risk of gang and criminal involvement. The programs are provided in partnership with SFDPW, Office of the Mayor, Laborers Training Center of Northern California, SFPUC, and Recology Sunset Scavenger. The program trains for positions as environmental service worker pre-trainee | Green Construction | http://mncsf.org/home/workforce-development/ |
| | OMI/ Excelsior | Urban Services YMCA/ OMI/Excelsior Beacon Center | Empowerment to Employment | Workforce training, counseling and placement | As an E2E participant, you will receive six weeks of professional development training as well as continuous support throughout the program. Upon completing six weeks of training, you will receive a $400 stipend. Within one month of completing training, you will be placed at a job site for a minimum of three months. You will earn $15 per hour. | Nonprofit support, construction, afterschool and social services support, hospitality | https://www.ymcasf.org/programs/empowerment-employment-e2e |
| | Outer Richmond | Richmond Area Multi-Services. Inc. (RAMS) | Hire-Ability Vocational Services, Peer Specialist Mental Health Certificate, Summer Bridge | | Hire-Ability is non-profit vocational services program, and division of RAMS, partnered with San Francisco Department of Public Health and California State Department of Rehabilitation which serves the San Francisco Bay Area community by connecting employers with trained, assessed and pre-qualified employees.We specialize in providing employers with a pool of employees that reflect the diverse and multicultural population of the region. Specifically, we assist employers in achieving their diversity goals by matching them with qualified individuals with disabilities.<br><br>In 2010, Richmond Area Multi-Services, Inc. and San Francisco State University jointly developed the Peer Specialist Mental Health Certificate Program. Funded by the Mental Health Services Act (MHSA), the primary goal of the Certificate program is to prepare consumers of community behavioral health services or family members with the basic skills and knowledge for entry-level peer specialist/counseling roles in this system as well as to provide people with experience and opportunities to further their career in the behavioral health field. The Peer Specialist Mental Health Certificate Program initially offered one 12-week classroom education and hands-on training course (now known as the Peer Specialist Mental Health Certificate Entry Course). The Peer | IT (information technology, technical support, customer service), Janitorial, food services, clerical, Healthcare | https://www.ramsinc.org/services.html |
| | Potrero Hill | RAMS' Hire-Ability | Employee Development, Work Adjustment, Situational Assessment, Cafe Phoenix, Janitorial Training, Helpdesk Training, Desktop Training, and Employment Services | Case management, career counseling, core competency training, vocational and on-the-job training, job placement and retention services | Hire-Ability serves as a bridge between the business community and the mental health system for people who are ready, willing, and able to return to work.We offer culturally competent vocational services to individuals with mental health disabilities. The goal is to enable participants to gain successful employment and improve self-sufficiency by providing a continuum of services from job preparation to employment in the community. Below are program summaries:<br><br>Employee Development (E.D.), Work Adjustment, and Program Situational Assessment Programs are designed to serve individuals who need basic job preparation and paid work experience in a structured group setting.<br><br>Cafe Phoenix food service assessment program is designed to assess PAES Counseling and Pre-Vocational Services individuals for work readiness and to work in food service, coffee shops and related businesses. Janitorial Training Program is designed to serve individuals who interested in getting trained in the janitorial field.Helpdesk Training Program is designed to serve individuals who want training on-the-job training while providing front end user support primarily over the phone under the direct supervision of the instructor.DeskTop Training Program is designed to serve individuals who want on-the-job training while providing desktop | IT (information technology, technical support, customer service), Janitorial, food services, clerical | http://www.hire-ability.org/index.html |
| | Sunset | Sunset Youth Services | Digital Technology programs, case management, and foundational skilsl training | Workforce training, career counseling and case management | In our Digital Arts Program, youth get access to and training in digital audio and film production, so they can express themselves, learn marketable skills, tell their stories, and build confidence in themselves and their work. UpStar Records is our youth-run record label aimed at turning today's hip hop enthusiasts into tomorrow's digital technology leaders. young adults receive case management and services including life skills workshops, financial literacy, resume writing, assistance in accessing healthcare, and educational support. | IT | http://sunsetyouthservices.org/programs/ |

# Appendix IX. Anchor Institution Program Metrics

The following are suggested steps to identify program metrics and how to determine what is both important and measurable. The steps are reproduced from The Democracy Collaborative's 2017 report, "Higher Education's Anchor Mission: Measuring Place-Based Engagement."

1. **Research what measures and indicators are currently being collected, and who is collecting them or can help collect them.**
2. **Determine if the initiative and chosen measures are replicable.**
3. **Identify gaps and opportunities.**
4. **Refine and develop definitions for the chosen measures.**
5. **Plan strategically.**

## Anchor Institution Program Core Metrics

The core metrics table below is reproduced from the Democracy Collaborative's 2017 report, "Higher Education's Anchor Mission: Measuring Place-Based Engagement."

| Category | | UCSF Effort (Internal Indicator) | Community Outcome (External Indicator) |
|---|---|---|---|
| **Engaged Anchor Institution** | | Anchor mission articulated in strategic plan | Surveys of community residents and organizations |
| | | Reflected in structure of UCSF (e.g., community engagement lead staff of cabinet rank) | |
| **Economic Development** | **Equitable Local and Minority Employment** | Percent of minority hires in staff positions | Local minority unemployment rate |
| | | Percent of local hires in staff positions | Local unemployment rate |
| | | Percent of employees at living wage | Living wage for UCSF |
| | **Vibrant Arts and Community Development** | Operating funds spent on arts and culture-based economic development | Numbers of art and performance spaces in local community supported by UCSF |
| | | Businesses created and retained | |
| | | Jobs created and retained | |
| | **Thriving Local and Minority Business** | Percent (or amount) of UCSF procurement to local businesses | Business survival rates in local community |

| | | | |
|---|---|---|---|
| **Economic Development (cont.)** | **Community** | | Number of business start-ups |
| | | Percent (or amount) of UCSF procurement to minority-owned businesses | Number of certified MBE business in local community |
| | | Percent (or amount) of UCSF procurement to woman-owned businesses | Number of certified WBE in local community |
| | **Housing Affordability** | Strong partnerships with local community development corporations | Percentage of households below 200 percent of poverty line who spend less than 30 percent of their income on housing |
| | **Sound Community Investment** | Percent of endowment invested in community impact investments (e.g. Community Development Financial Institutions) | Local lending availability from CDFIs and public programs (e.g. city revolving loan or investment funds) |
| | | Investment in local business district development | Local bank lending data (survey data of ability of local businesses to obtain loans, percentage) |

| | | | |
|---|---|---|---|
| **Health, Safety, and Environment** | **Healthy Community Residents** | Dollars spent on public health interventions (e.g., clinics) | Infant mortality rate (number per 1,000 births) |
| | | | Healthy food access (USDA food desert score) |
| | **Safe Streets and Campuses** | Dollars spent on neighborhood development | Violent crime data (incidents per 1,000 people) |
| | | Dollars spent on streetscape improvement | Property crime data (incidents per 1,000) |
| | | Number of neighborhood complaints | |
| | **Healthy Environment** | Dollars spent on environmental health initiatives | Asthma incidence |

| | | | |
|---|---|---|---|
| **Community Building and Education** | **Stable and Effective Local Partners** | Is there a partnership center? | Capacity survey of community partners |
| | | Is there a community advisory board? | |
| | | Amount of community building budget (in dollars or FTEs) | |
| | **Financially Secure Households** | Budget for financial education | Percent in asset poverty |
| | | Income tax filing assistance | |
| | **Educated Youth** | Level of support in FTEs for K-12 school partnerships, in-school support (number of FTEs) | 3rd grade math proficiency |
| | | Level of investments in dollars in K-12 school partnerships | 3rd grade math proficiency |
| | | | Advancement to college or apprenticeship |
| | | | Graduation rate |

## Partnership Effectiveness Survey

The Partnership Effectiveness Survey allows UCSF to understand how current partners benefit from working with the institution, and the ways that the UCSF can improve its relationship. The survey is less concerned about demographic data, but rather on organizations and businesses that UCSF defines as being important to its strategic goals. The survey is based on resources from the Democracy Collaborative's 2017 report, "Higher Education's Anchor Mission: Measuring Place-Based Engagement."

1. **Name of organization:**

2. **Where is your organization located and what is the geographic scope of your work?**

3. **What is the core focus of your organization?**
    a. Healthy behavior and healthy eating promotion
    b. Psychosocial (mental health, substance abuse, stress(?)) health services
    c. Education and Youth Development
    d. Housing
    e. Workforce Development/Job Training
    f. Economic Development
    g. Entrepreneurship
    h. Neighborhood safety and advocacy
    i. Family services
    j. Specialized care
    k. Case management
    l. Environment
    m. Arts & Culture
    n. Research
    o. Other, please specify _____

4. **Do you participate in any activities that are part of UCSF? If so, what are they?**

5. **What are the benefits of working with UCSF?**

6. **Are there programs or departments doing a good job in serving the community?**

7. **What are the challenges of working with UCSF?**

8. **Are there any areas that UCSF or specific departments can improve in responding to community needs?**

9. **In your opinion, how could the institution improve its partnerships with community organizations?**

**10. Now I am going to read you some statements about your perceptions about UCSF as a whole [including leadership, affiliates, buildings, property, students]. For each statement tell me whether you strongly agree, agree, disagree, or strongly disagree:**

| | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|
| UCSF is committed to helping my community | 1 | 2 | 3 | 4 | 5 |
| UCSF is a partner in improving my community | 1 | 2 | 3 | 4 | 5 |
| People in this community trust UCSF | 1 | 2 | 3 | 4 | 5 |
| UCSF intrudes on my community boundaries | 1 | 2 | 3 | 4 | 5 |
| UCSF does not recognize the positive things about my community | 1 | 2 | 3 | 4 | 5 |

**11. Over the past 12 months [or some other specific time frame]. Please provide your opinion regarding the overall role of UCSF in your community:**

| | Strongly Agree | Agree | Neither Agree nor Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|
| UCSF supports local business in my community | 1 | 2 | 3 | 4 | 5 |
| UCSF has faculty and staff who use their expertise to support my community | 1 | 2 | 3 | 4 | 5 |
| UCSF has programs in which students provide support for my community | 1 | 2 | 3 | 4 | 5 |
| UCSF is known as an institution that care about my community | 1 | 2 | 3 | 4 | 5 |
| UCSF has a positive impact on local schools | 1 | 2 | 3 | 4 | 5 |
| UCSF is seen as a trusted partner in my community | 1 | 2 | 3 | 4 | 5 |

**12. Any other questions, perceptions, or comments about UCSF as a whole or specific programs/departments that you'd like to share?**

# Appendix X. Collective Impact Model Overview

The following literature review is based on John Kania and Mark Kramer's 2011 article, "Collective Impact", published in the Stanford Social Innovation Review; and Fay Hanlebroen, John Kania, and Mark Kramer's 2012 article, "Channelling Change: Making Collective Impact Work."[1],[2]

Definition:

According to John Kania and Mark Kramer's "Collective Impact" article, collective impact initiatives are: "long-term commitments by a group of important actors from different sectors to a common agenda for solving a specific social problem. Their actions are supported by a shared measurement system, mutually reinforcing activities, and ongoing communication, and are staffed by an independent backbone organization."

Purpose:

An anchor institution strategy should adopt a collective impact framework because large-scale social change requires effective cross-sector coordination, rather than isolated intervention from individual organizations. A collective impact framework provides a guide for coordination and partnerships, in order to achieve shared goals.

Currently, cross-sector coordination is difficult, partly because funders and nonprofits are used to focusing on independent action as the primary vehicle for social change. Most funders currently, when tasked with choosing a few grantees from many applicants, must ascertain which organizations make the greatest contribution toward solving a social problem. Grantees, in turn, compete to be chosen by emphasizing their individual activities and results, and isolating their influence from all other variables. As a result, the nonprofit sector often operates using an approach that Kania and Kramer calls isolated impact.

Isolated impact is an approach oriented toward finding and funding a solution embodied within a single organization, as if social problems only require a cure that needs to be discovered. Funders search for what they believe to be the most effective interventions, and hope that these organizations will grow to extend their impact more widely. Nonprofits, in turn, try to invent independent solutions to major socia problems, often working at odds with each other and increasing the perceived resources required to make meaningful progress. The problems associated with isolated impact are compounded by the tendency for isolation within the non-profit sector. Social problems result from the complex interplay of governmental and commercial activities, not only from the behavior of social sector organizations. As a result, complex social problems can be solved only by comprehensive and effective cross-sector coalitions that engage those outside the nonprofit sector.

[1] Kania, John & Kramer, Mark. "Collective Impact" Stanford Social Innovation Review, 2011. Accessed March 2, 2018. https://ssir.org/images/articles/2011_WI_Feature_Kania.pdf.
[2] Hanleybroen, Fay, Kania, John, & Kramer, Mark. "Channeling Change: Making Collective Impact Work." Stanford Social Innovation Review. Jan 26, 2012. Accessed March 2, 2018. https://ssir.org/articles/entry/channeling_change_making_collective_impact_work

Five Conditions of Collective Success

The following five conditions of collective success are reproduced from John Kania and Mark Kramer's 2011 article, "Collective Impact", published in the Stanford Social Innovation Review.

- **Common Agenda:** Collective impact requires all participants to have a shared vision for change, one that includes a common understanding of the problem and a joint approach to solving it through agreed upon actions. Funders can play an important role in getting the organizations to act in concert.

- **Shared Measurement Systems:** Developing a shared measurement system is essential to collective impact. Agreement on a common agenda is illusory without agreements on the ways success will be measured and reported. Collecting data and measuring results consistently on a short list of indicators at the community level and across all participating organizations not only ensures that all efforts remain aligned, it also enables the participants to hold each other accountable and learn from each other's successes and failures.

- **Mutually Reinforcing Activities:** Collective impact initiatives depend on a diverse group of stakeholders working together, not by requiring that all participants do the same thing, but by encouraging each participant to undertake the specific set of activities at which it excels in a way that supports and is coordinated with the actions of others. The power of collective action comes not from the sheer number of participants or the uniformity of their efforts, but from the coordination of their differentiated activities through a mutually reinforcing plan of action. Each stakeholder's efforts must fit into an overarching plan if their combined efforts are to succeed. The multiple causes of social problems, and the components of their solutions, are interdependent. They cannot be addressed by uncoordinated actions among isolated organizations.

- **Continuous Communication:** Developing trust among nonprofits, corporations, and government agencies is a monumental challenge. Participants need several years of regular meetings to build up enough experience with each other to recognize and appreciate the common motivation behind their different efforts. They need time to see that their own interests will be treated fairly, and that decisions will be made on the basis of objective evidence and the best possible solution to the problem, not to favor the priorities of one organization over another.

- **Backbone Support Organizations:** Creating and managing collective impact requires a separate organization and staff with a very specific set of skills to serve as the backbone for the entire initiative. Coordination takes time, and none of the participating organizations has any to spare. The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails.

The backbone organization requires a dedicated staff separate from the participating organizations that can plan, manage, and support the initiative through ongoing facilitation, technology and communications support, data collection and reporting, and handling the myriad logistical and administrative details needed for the initiative to function smoothly. Strive has simplified the initial staffing requirements for a backbone organization to three roles: project manager, data manager, and facilitator.

Collective impact also requires a highly structured process that leads to effective decision making. In the best circumstances, these backbone organizations embody the principles of adaptive leadership: the ability to focus people's attention and create a sense of urgency, the skill to apply pressure to stakeholders without overwhelming them, the competence to frame issues in a way that presents opportunities as well as difficulties, and the strength to mediate conflict among stakeholders.

Preconditions for Collective Impact

The following preconditions for collective impact are reproduced from Fay Hanlebroen, John Kania, and Mark Kramer's 2012 article, "Channelling Change: Making Collective Impact Work."

- **An influential champion:** The most critical factor by far is an *influential champion* (or small group of champions) who commands the respect necessary to bring CEO-level cross-sector leaders together and keep their active engagement over time. We have consistently seen the importance of dynamic leadership in catalyzing and sustaining collective impact efforts. It requires a very special type of leader, however, one who is passionately focused on solving a problem but willing to let the participants figure out the answers for themselves, rather than promoting his or her particular point of view.

- **Adequate financial resources:** Second, there must be adequate *financial resources* to last for at least two to three years, generally in the form of at least one anchor funder who is engaged from the beginning and can support and mobilize other resources to pay for the needed infrastructure and planning processes.

- **Sense of urgency for change:** The final factor is the *urgency for change* around an issue. Has a crisis created a breaking point to convince people that an entirely new approach is needed? Is there the potential for substantial funding that might entice people to work together, as was the case in Franklin County? Is there a fundamentally new approach, such as using the production, distribution, and demand creation capacities of the private sector to reach millions of people efficiently and sustainably, as was the case for GAIN? Conducting research and publicizing a report that captures media attention and highlights the severity of the problem is another way to create the necessary sense of urgency to persuade people to come together.

# Appendix XI. UCOP Sustainable Practices Policy Update

The following information summarizes the UCOP Sustainable Practices Policy changes concerning "Economically and Socially Responsible Spend" (EaSR), and is reproduced from a presentation by UCOP Procurement Services. For the actual policy language, please contact Stephanie Lopez, Special Programs Manager, Small/Diverse Business, Sustainability & Bank Card for UCOP Procurement Services.

**Included in the update, as of the writing of this report:**

- Update only applies to UC campuses (does not include Construction, Medical Centers or LBNL)
- Set goal of 25 percent Socially and Economically Responsible Spend as a total percentage of addressable spend.
    - EaSR spend is compromised of select certification criteria
    - Goal to be reached within five (5) fiscal years of adoption of this section of the Guidelines.
    - Goal to kick off in FY 18-19; target to be reached FY 22-23
    - UC Small and Diverse Business Advisory Council to provide ongoing support as UCOP Procurement Office develop milestones, category assessments, location opportunities, etc.
- The policy also requires a minimum of 15 percent of the points utilized in competitive solicitation evaluations to be allocated for sustainability criteria – to take effect FY 19-20; will allow for exceptions by CPO approval

**Economically and Socially Responsible Spend Definition**

The EaSR spend includes the following criteria/certificaitons:

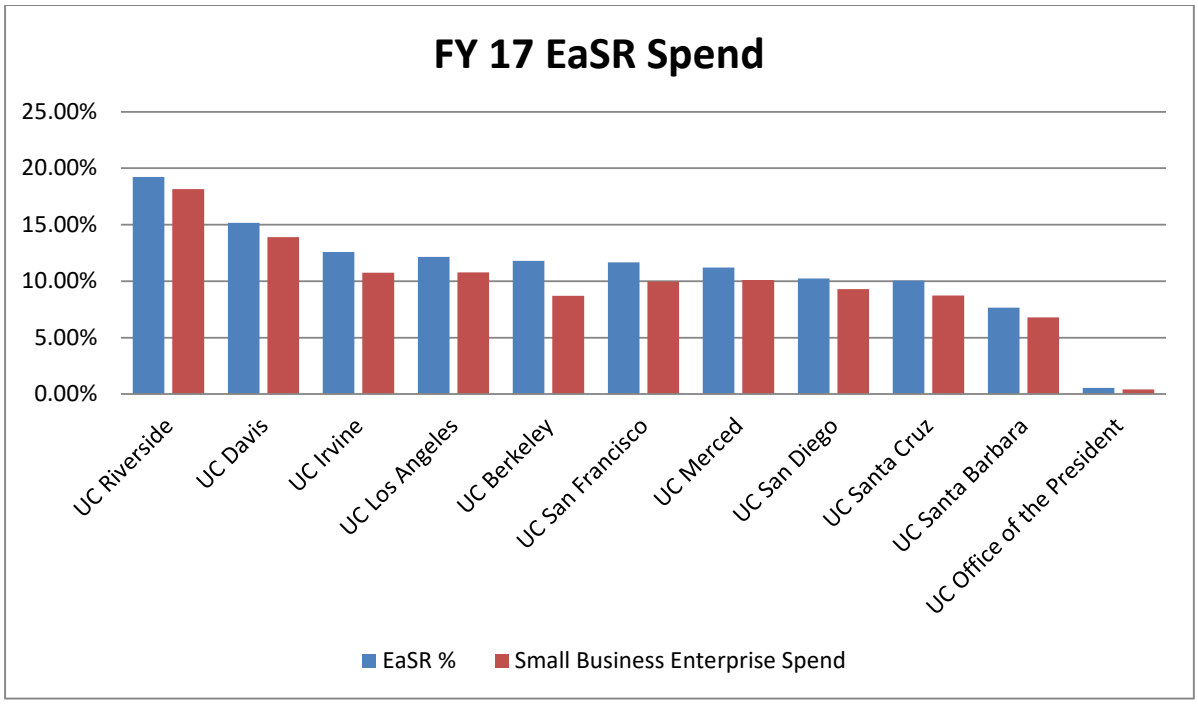
- Small Business Enterprises: All state/gov, ceritifcations, SBA criteria, HUBZone, 8(a)
- Disadvantaged Business Enterprises: Single certification criteria nationwide
- Women-owned Businesses: All state and federal certifications
- Minority Business Enterprise: All gov. agency certificaitons
- Veteran-owned/ Service Disabled Veteran-owned Businesses: All state/gov. certifications

UCOP is exploring the Local Business Enterprise Goal(s) and criteria tied to supplier internal management. Local business goals by campus/region and/or general CA-based businesses goal. Goals focused on suppliers code of conduct, etc.

**Current UC Campuses EaSR Spend**

Today there is a wide range of EaSR spending by campus, though the five year timeline to achieve 25 percent is reasonable for all sites.

| Campus | EaSR % | Small Business Enterprise Spend |
|---|---|---|
| UC Riverside | 19.22% | 18.16% |
| UC Davis | 15.16% | 13.91% |
| UC Irvine | 12.59% | 10.75% |
| UC Los Angeles | 12.15% | 10.79% |
| UC Berkeley | 11.79% | 8.71% |
| UC San Francisco | 11.68% | 9.98% |
| UC Merced | 11.21% | 10.1% |
| UC San Diego | 10.25% | 9.29% |
| UC Santa Cruz | 10.04% | 8.74% |
| UC Santa Barbara | 7.66% | 6.79% |
| UC Office of the President | 0.54% | 0.42% |



# Appendix XII. San Francisco Small Business Support Organizations

| Small Business Support Organizations | | |
|---|---|---|
| **Nonprofit Organizations** | | |
| MEDA | Business development programs, asset building programs, workforce development programs, community loan fund,<br>• MEDA offers microloans up to $10,000 | http://medasf.org/ |
| Opportunity Fund | California's Leading Microfinance Organization, based in SF - Recommended by Marco | https://www.opportunityfund.org/get-involved/business-directory/ |
| Renaissance Entrepreneurship Center | Looking forward to our next 30 years of impacting Bay Area communities, Renaissance Entrepreneurship Center is poised to help thousands of individuals achieve personal, financial, and social transformation through the power of small business. A success story of our own for the past three decades, Renaissance has helped open more businesses than any other non-profit in the Bay Area, and according to the Aspen Institute, posts the best record for business longevity. From inception to business planning, access to capital and resources, and ongoing assistance that growing businesses require, Renaissance fuels community vitality by empowering under-served individuals to start businesses that bring jobs, character, and sustainable economic health to the local economy. | http://www.rencenter.org/ |
| SFMade | SFMade's mission is to build and support a vibrant manufacturing sector in San Francisco, that sustains companies producing locally-made products, encourages entrepreneurship and innovation, and creates employment opportunities for a diverse local workforce. | https://sfmade.org/ |
| La Cocina | The mission of La Cocina is to cultivate low income food entrepreneurs as they formalize and grow their businesses by providing affordable commercial kitchen space, industry-specific technical assistance and access to market opportunities. We focus primarily on women from communities of color and immigrant communities. Our vision is that entrepreneurs gain financial security by doing what they love to do, creating an innovative, vibrant and inclusive economic landscape. | https://www.lacocinasf.org/ |
| **Government Partners** | | |
| Small Business Development Center | Works closely with SFOEWD's Invest in Neighborhoods program - recommended by Joaquin - mission is to provide business owners and managers with information, training, and specialized one-on-one consulting. We are here to help you succeed, and, through your success, help stimulate our local and regional economy. | http://www.sfsbdc.org/ |
| SFOEWD Industries Programs | Dedicated to continuing San Francisco's tradition of business excellence, OEWD's Business Development team provides specialized support to address the unique needs of businesses in a variety of key sectors. For emerging and established companies alike, our team serves as a centralized clearinghouse of information and services to support these industries' ongoing success. | http://oewd.org/industry-programs |
| Central Market Cultural District Loan Fund | • Loan terms: A one percent (1%) loan fee is assessed on the loan amount. Borrower is also responsible for the appraisal, title, and other out-of-pocket expenses related to loan processing, approval and documentation<br>• Loan uses: Acquisition of real estate; new construction or rehabilitation; tenant and/or leasehold improvements, Soft costs (such as legal and loan fees), Working capital; inventory purchase, purchase of equipment and machinery and management assistance to enable the business to carry out the project | http://www.oewd.org/ |
| Merriweather & Williams - Surety Bond and Contract Financing and Assistance Program | the City and County of San Francisco (CCSF) created the Surety Bond & Contract Financing Assistance Program to increase participation of underrepresented Bay Area contractors in city and county construction projects. CCSF's Surety Bond & Contract Financing Assistance Program offers local contractors a range of services, from technical support to financial assistance. In addition to fostering greater opportunities for local business enterprises, the program has resulted in long-term cost savings to participating municipalities, in part by expanding the pool of qualified contractors able to bid on public sector projects. | http://imwis.com/services/contractor-bonding-development-programs/city-and-county-of-san-francisco/ |

| | | |
|---|---|---|
| **Community Financial Institutions** | | |
| San Francisco Revolving Loan Fund (RLF) - Working Solutions | • Working Solutions provides the SF Revolving Loan Fund, microloans from $5,000 to $25,000 with a fixed interest rate between 4-6%. | http://www.workingsolutions.org/ |
| San Francisco Emerging Business Loan Fund (ELBF) - Bay Area Small Business Finance | • Loan amounts from $50,000 – $1,000,000<br>• Interest Rates: Currently from 4.5% to 7.25% percent (Prime + 4%), depending on product, no application fee, low closing costs | http://www.basbf.com/ |
| Valley Economic Development Center | • Loan Amount: Minimum $50,000 to $500,000 maximum for existing businesses in operation for at least 2 years | http://www.vedc.org/ |
| Pacific Community Ventures | • Loan Amount: Minimum $50,000 to maximum of $150,000 at 7% fixed rate per<br>• Loan Uses: Working capital, Inventory purchase, Acquisition and/or repair of machinery and equipment, New construction, expansion and/or repair, Acquisition of existing business entrepreneurs and small business owners | https://www.pacificcommunityventures.org/ |
| Bay Area Development Company | Bay Area Development Company is a Certified Development Company, and one of the top twenty of over 300 SBA 504 lenders nationwide. | http://www.baydevco.com/ |
| Capial Access | Capital Access is a leading Certified Development Company providing long-term, fixed rate financing through the SBA 504 loan program, which offers 90% financing to business owners for the purchase, renovation, or construction of commercial real estate for their growing businesses. | http://www.capitalaccess.com/ |
| **Minority Business Development Organizations** | | |
| Asian Business League | The Asian Business League of San Francisco (ABL-SF) was founded in 1980 as a nonprofit organization dedicated to the promotion of Asian Pacific American leadership in business. Through seminars, workshops, and social and networking functions, ABL-SF provides its members with opportunities to develop and enhance leadership and management skills, and to build relationships with other Asian professionals. ABL-SF also provides its members with opportunities to meet business leaders in the community and to address issues facing Asian professionals and Asian-owned businesses. | https://www.ablsf.org/ |
| San Francisco African American Chamber of Commerce | The San Francisco African American Chamber of Commerce (SFAACC) is one of California's most influential minority business organizations, representing and promoting African American business owners in San Francisco. Through advocacy and economic development, SFAACC is creating a firm economic base that supports the self-determination and survival of African American businesses. SFAACC is a non-profit 501c3 corporation. | https://www.sfaacc.org/ |
| San Francisco Filipino American Chamber of Commerce | The San Francisco Filipino American Chamber of Commerce (SFFACC) is a non-profit organization, which seeks to promote the economic development of the Filipino American business community in the San Francisco Bay Area.<br><br>The SFFACC assists its members in the following ways:<br>- By providing networking opportunities to expand and promote members' businesses;<br>- By initiating programs and committees designed to enhance business skills and effectiveness among its members;<br>- By serving as an information resource center for new business opportunities and business referrals. | http://sffilamchamber.org/ |
| Golden Gate Business Association | The Golden Gate Business Association mission is to champion opportunity, development, and advocacy for our LGBTQ & Allied business community.<br><br>GGBA creates opportunity for marketing, networking, procurement, and referral-based business growth; programs that support development of business skills and expertise through workshops and seminars; and we advocate for positive economic, social, and political change. | https://ggba.com/ |
| Hispanic Chambers of Commerce of San Francisco | The HCCSF is formed as an umbrella organization to unite the efforts of four small ethnic chambers from the San Francisco Bay Area. The Nicaraguan-American, Salvadoran-American, Guatemalan-American and Latin American & Caribbean chambers have united in order to solidify their Hispanic branding and to provide better access to capital and services to their membership. | https://hccsf.com/ |
| Southeast Asian Community Center | Provides SBA Micro-loans; SEACC is a non-profit community agency that provides TA and commercial loans of up to $35,000 to low-income entrepreneurs and small business owners/ | http://www.seaccusa.org/ |

| | | |
|---|---|---|
| **Neighborhood Agencies** | | |
| Bayview Merchants Association | The Bayview Merchants' Association is a non-profit, non-partisan group of neighborhood businesses in the Bayview-Hunters Point district of San Francisco. We are dedicated to the success of the merchants that make up our organization. Our mission is as follows:<br>To unite - We believe in strength through unity. We coordinate meetings, projects and special events that bring together and mutually benefit our members.<br>To inform - We believe knowledge is power. We strive to keep our members informed of community meetings, events, and various business opportunities in order to best position them for long-term success.<br>To promote - We endeavor to serve as the central voice for all Bayview-Hunters Point merchants. We work to promote our members' business interests through local government advocacy and multiparty marketing campaigns. | http://www.bayviewmerchants.org/ |
| Excelsior Action Group | Excelsior Action Group mission: To revitalize the San Francisco Excelsior neighborhood's commercial corridor by involving residents, merchants, neighborhood associations, and city agencies through activities aimed to reinvigorate, green, beautify, strengthen, and unify our diverse community. | http://www.eagsf.org/ |
| Mission Merchants Association | Mission Merchants Association (MMA) consists of over 100 businesses and property owners in the Mission District. We work with those businesses to promote and advocate for all locally-owned neighborhood businesses. | https://missionmerchants.com/ |
| Ocean Avenue Association | Established in December 2010, the Ocean Avenue Community Benefit District is one of the newest CBDs in San Francisco. The district boundaries include properties that front Ocean Avenue from Manor Drive on the west running along Ocean Avenue to Interstate 280. There are 148 properties within the district including commercial, retail, educational, non-profit and residential uses. Managed by a nonprofit organization called Ocean Avenue Association, this district will focus on cleaning and maintenance; safety; marketing; and streetscape improvements for 15 years. | http://oceanavenueassociation.org/ |
| Tenderloin Community Benefits District | The Tenderloin Community Benefit District (TLCBD) works relentlessly to provide a clean and safe environment. Strong community partnerships and supportive collaboration with city agencies will create positive change in the Tenderloin neighborhood. Organization services are focused on implementing neighborhood improvements around the physical environment, economic development, and neighborhood pride. | https://tlcbd.org/ |
| **Business Advocacy Group** | | |
| San Francisco Council of District Merchants Association | Over the past sixty eight years, the Council has distinguished itself by drawing together the disparate merchants associations in the neighborhood commercial districts of the City. Together, we have advocated for street lighting, traffic control, parking, and legislation to improve the business climate in the City.<br><br>Our members represent a variety of local businesses including an eclectic mix of food and drink, salons, spas, healers, shopping, schools, business services, entertainment and more. Our Mission is to protect, preserve, and promote small businesses in San Francisco. | https://www.sfcdma.org/ |
| California Reinvestment Coalition | CRC builds an inclusive and fair economy that meets the needs of communities of color and low-income communities by ensuring that banks and other corporations invest and conduct business in our communities in a just and equitable manner. | http://www.calreinvest.org/about/what-we-do |
| Centers for Applied Competitive Technologies (CACT) | "The San Francisco CACT offers a wide range of technical assistance, consulting services, and customized workforce development training to companies located in San Francisco, North and East Bay areas. Our technology-related trainings focus on digital design tools for industrial and product designers, as well as the sewn products industry."1 | http://makingitincalifornia.com/ |
| iHub | Go Biz network of 16 state centers, including one in San Francisco, to promote innovation and partnership in healthcare, manufacturing and aerospace. | http://sfced.org/sf-ihub/ |
| East Bay Advanced Manufacturing Partnership | Founded in 2014 to be a vehicle for East Bay manufacturers to set priorities and work with a range of partner organizations at a single table to strengthen manufacturing, build awareness of jobs and salaries throughout the East Bay | http://www.ebamp.org/ |

# Appendix XIII. Procurement Strategies in the Proposition 209 Era.

The list below provides examples of public entities operating different types of procurement programs that have been cited as being well-developed and effective at increasing vendor diversity, inside and outside California. These programs contain multiple elements, and the list is grouped by type of program, rather than by degree of legal risk in California under Proposition 209. The list is reproduced from Julian Gross and Tim Lohrentz's 2012 report, "Public Contracting in the Proposition 209 Era: Options for Preventing Discrimnation and Supporting Minority- and Women-Owned Businesses", published by the Insight Center for Community Economic Development.[1]

**1. Supplier Diversity** (Florida; Washington; City of Grand Rapids, Michigan; Contra Costa County, California)

Florida has an elaborate supplier diversity program. The program is noteworthy because program elements would most likely each be permitted by Proposition 209 if undertaken by a California public entity. A look at some of the activities of the Florida program:

- Florida Office of Supplier Diversity sponsors workshops, trade shows, and conferences They also have special match-maker events. The annual Matchmaker and Trade Fair h over 1000 participants, mostly MWBE firms but also state purchasing agents and prim vendors. (Approach permitted by Prop. 209.)
- They also create strategic alliances with the Supplier Diversity development council an member corporations to spotlight certified firms and create new contract opportunitie
- They bring together the purchasing agents of each state department and each month will spotlight one or more vendors in a targeted forum. They will also do vendor spotlights at cross-agency content meetings – such as IT firms at the IT state officer meeting.
- Each quarter, each agency, including state universities, receives a procurement report including spending from certified and noncertified M/WBEs. The Governor's office reviews the report and if the proportion of M/WBE has dropped, the Governor will ask each agency why they dropped. There is commitment at the top. Each agency will receive a report card and each contractor will receive a report card on their supplier diversity. These are made public. In general, they have had a lot of cooperation. For at least some of the time the agency director's job performance review is impacted by th supplier diversity reports.

**2. Blended Small Business Enterprise/ Minority-Business Enterprise Programs**

[1] Gross, Julian and Lohrentz, Tim. "Public Contracting in the Proposition 209 Era: Options for Preventing Discrimnation and Supporting Minority- and Women-Owned Businesses". The Insight Center for Community Economic Development. January 2012. Accessed August 19, 2018. http://ww1.insightcced.org/uploads/assets/Contracting%20in%20the%20209%20Era.pdf.

Certain preference programs combine race-based and race-neutral elements, by targeting both MBEs from the whole jurisdiction and SBEs from geographically impoverished areas. In each case the jurisdiction then used a preference program, generally a subcontracting program, to move procurement dollars to the geographic areas or to MWBEs. For example Ohio uses the federal HUB areas for the geographic designation of its program along with MBEs, mainly in the construction sector. (Iowa's Targeted Small Business enterprise program, Minnesota's Economically Disadvantaged/Targeted Group business enterprise program, and Ohio EDGE. Ohio calls the EDGE race neutral.) In California, program elements that provide race-based preferences, including MWBE-specific outreach requirements, probably violate Proposition 209, as discussed above.

**3. Other Variations on Small Business Enterprise Programs** (Virginia; Los Angeles; San Diego; Oregon)

In these programs, diversity is advanced by race- and gender-neutral measures and by utilizing MWBEs, as any other firm, on below-threshold purchases. Virginia's program is called SWAM – Small, Women, and Minority business enterprise program. The City of Los Angeles has the MWOBE program – Minority, Women and Other Business Enterprise program. Los Angeles' program includes targeted outreach to MBEs and WBEs, but also to OBEs. Variations on the SBE program include the Local Small Business Enterprise program, where only small businesses within the jurisdiction or other area, are included (City of San Diego) Another variation is the Emerging Business Enterprise program which is essentially an SBE program where the size of eligible firms is smaller than the typical SBE program (Oregon). Each of these program elements is permitted by Proposition 209.

**4. Improved Outreach**

Each of the following program elements can be implemented in California without violating Proposition 209, perhaps with minor tweaks from approaches taken in other states:

- Vendor outreach and vendor notification: provide information about bid opportunities to MWBEs by telephone call conferences, video conferences, and webinars. (Michigan).
- Keep up a list of potential projects for MWBE firms on website. (Indiana)
- Outreach for the purpose of building relationships between agency purchasing agents and MWBEs and to encourage firms to become active public agency vendors – register or certify. Trade shows, expositions, trade fairs, other outreach/networking events or regular meetings (quarterly) to highlight MWBEs, with corporations, municipalities, local/state government purchasing agents. (Kansas, Maryland, Massachusetts, North Carolina, Tennessee). Setting up presentations by MWBE vendors to relevant state purchasing agents (Texas). Vendor outreach at the annual business meetings of the various business associations and ethnic chambers (Florida).

**5. Improved Bid Process**

- Electronic procurement system sends special bid announcements to MWBE firms. (Delaware) (Permitted by Proposition 209 so long as bid announcements are widely broadcast.)
- Requiring a MWBE bid. At least one of three quotes for bids under $25K needs to be a MBE or WBE (Arizona). Later this was raised to bids of less than $50K. Executive Order 2000-4. (Possibly permitted by Proposition 209 – see discussion in main document.)
- Purchasing staff encouraging the Prime Contractor of larger projects to use an M/WBE subcontractor on construction-related projects. It is voluntary and Prime Contractors need to inform purchasing staff which subs they use. In the case of Vermont, usage of M/WBEs is not tracked. (Vermont Dept. of Building and General Services, for any project >$80,000.) (Permitted by Proposition 209.)
- A public agency may waive bonding requirements for MWBEs or DBEs (Maryland DOT), or guarantee the bond, making the bond much easier to obtain. (Possibly permitted by Proposition 209, depending on program details and implementation.) Both Mississippi and Ohio offer a 90 percent bond guarantee to MBE firms.

**6. Tracking/ Publicity**

Each of the following steps is permitted by Proposition 209:

- Tracking level of procurement with MWBEs of various agencies and posting on a website (many, including Florida, Georgia, Virginia). Florida tracks spending with both certified and non-certified MWBEs, while Georgia tracks only non-certified MWBEs (vendor self-registry).
- Publishing every prime vendor/contractor's MWBE spend on the internet each month. (previously, Florida)
- Giving each contractor an 'A' to 'F' grade for their MWBE sub-contracting participation and publishing these grades on the internet. A Title VI assessment is done on any firm receiving an 'F' for three consecutive years. (previously, Florida)
- In order to give positive publicity to those who voluntary participate well, conducting an annual Minority Business Awards event and giving out awards. (Florida45 and Illinois DOT). In the case of Florida the awards included:
    - Minority business of the year
    - State agency of the year (for the highest percentage of M/WBE procurement)
    - State advocate of the year
    - Director's award for majority companies that help mentor or form strategic alliances with minority firms
    - Corporation of the year, for strategic partnerships with minority firms on state contracts

**7. Business Environment**

- Commercial nondiscrimination law – Passing a law that it makes it possible for a business to bring a complaint against any other business, including financial institutions, if they believe they have been discriminated against, based on race, gender, etc. The complaints are investigated by the Human Rights Commission and penalties can result. (Maryland) (Permitted by Proposition 209.)
- Requiring a group of companies regulated by the government agency and with over a certain amount in annual revenue to carry out a (race and gender neutral) supplier diversity program. (California PUC for all utility companies with over $25 million in annual revenue.) (Permitted by Proposition 209.)

**8. Networking**

Each of the following approaches is permitted by Proposition 209:

- Helping MWBEs link to private corporations and companies through hosting networking events and by setting up one-on-one meetings.
- Producing a directory (online or hard copy) of MWBEs including their NAICS and geographic areas of service and distributing to other governments to use as well as to large vendors/contractors. (Arizona, Iowa, and South Dakota DOT). Arizona also shares the directory with all major cities and counties through its Arizona Steps Up program. Iowa promotes the directory and online database to corporations and private companies. South Dakota DOT previously provided an in-color DBE (or MWBE) directory with the owners' photographs and business profile to contractors and on the internet.

**9. Technical Assistance**

Each of the technical assistance approaches described below can be implemented without violating Proposition 209, with careful attention to program details. Legal risk can by minimized or eliminated by ensuring that these programs are divorced from the contract award process itself, and by allowing participation by OBEs (even though program services and outreach are focused on MWBEs). These types of programs may be permissible even without those steps, however:

- Workshops and business development services for MWBEs (many states including Alabama DOT, Arkansas, Indiana, Massachusetts, Nebraska Economic Development, Washington DOT, and Wisconsin). For example Arkansas Department of Economic Development provides multiple services specifically to MBEs, including workshops and trainings, marketing projects, special consultant services, feasibility studies, manufacturing services, and assistance with large procurement or specialized entrepreneurial projects. Additional workshop topics provided by other states include: how to get bonded and how to get certified. Wisconsin will help write a business plan for selected MBEs.

- Mentor-protégé program for MWBEs in order to strengthen their businesses and prepare them for doing business with the public agency and corporations. Many states and cities do this.
- Subsidized-cost high-end one-on-one business development services to MBEs. (Indiana, previously combined state funds with federal MBDA funds).
- Assisting one specific racial or ethnic group, with evidence of being excluded. The assistance may include how to how register (or certify) as vendors and information and assistance in obtaining public contracts. (North Dakota, Native American Business Center.)

**10. Education**

Sponsoring or organizing youth-of-color entrepreneurial programs/classes/activities in order to expose the youth to business development. (Arkansas, Delaware) (Should be permitted under Proposition 209, with attention to program details.)

**11. Financing**

As with the technical assistance approaches described above, the financing approaches set forth below can be implemented without violating Proposition 209, with careful attention to program details. Legal risk can by minimized or eliminated by ensuring that these programs are divorced from the contract award process itself, and by allowing participation by OBEs (even though program services and outreach are focused on MWBEs). These types of programs may be permissible even without those steps, however.

- Bond guarantees: Guarantee 90% of necessary bonds for MWBEs. (Mississippi and Ohio)
- Loan program: Low-interest loans for MWBEs (Mississippi, Ohio, Rhode Island, and Washington). Variations include providing funding to nonprofit organizations to administer a MWBE loan fund (New York) and a capital access fund (Ohio).
- Previously Ohio operated the Venture Capital Tax Credit program, part of which was especially designed for investments in MBEs. A 30% tax credit for investments of up to $150,000 in MBEs was provided as long as the MBEs were located in economically distressed counties.

# Appendix XIV. Establishing a Governance Structure

The following section outlines the staff and resource capacity needed to establish an anchor institution strategy governance structure. The information is reproduced from the 2017 "Anchor Mission Playbook" report prepared by Rush University Medical Center.[1]

**Resource Capacity**

Catalyzing and institutionalizing an Anchor Mission approach will require an institution to dedicate people, time, and resources. While not every institution may be able to commit these resources from the onset, the following should be seen as goals for systematizing and sustaining this approach:

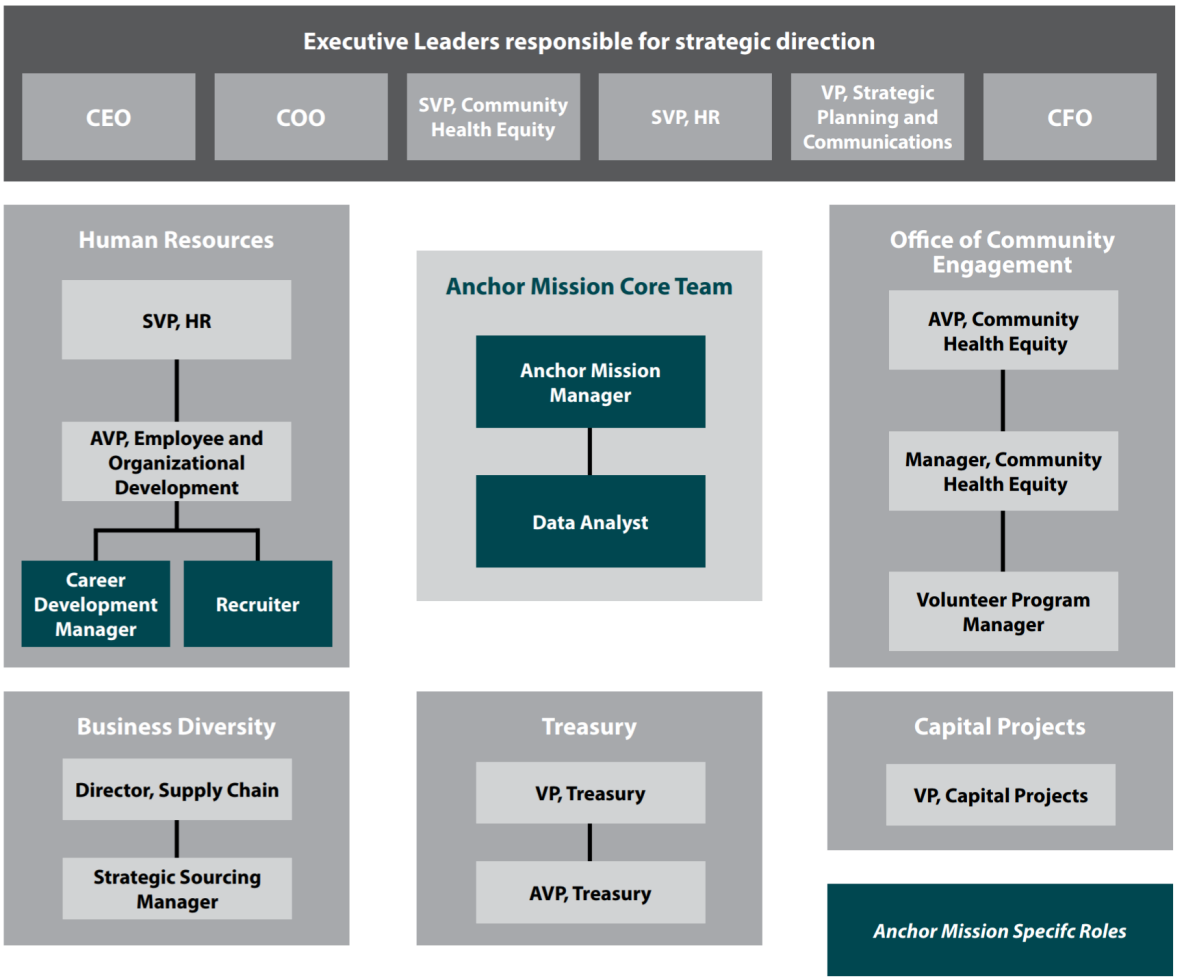
- At least 0.75 – 1.0 FTE of project manager's time and at least 0.5 FTE data analyst dedicated to anchor mission efforts
- Staff in the relevant departments or business units dedicated to Anchor Mission Initiatives as part of their existing job
- 1.0 FTE Career Development Manager and 1.0 FTE Recruiter/ Community Liaison Talent Acquisition Consultant dedicated to HR anchor initiatives
- Financial readiness assessment and preliminary budget
- Institutional databases from HR, Supply Chain/Procurement and other business units
- A dashboard for tracking and reporting progress
- Buy-in from leadership team to build and execute plans

**Organizational Structure**

To launch an Anchor Mission program, it is recommended that an institution incorporate ongoing Anchor Mission support into its organizational structure. Based on our experience, the team of individuals involved in the Anchor Mission, referred to in this playbook as the Anchor Mission Working Group, and should include an Executive Leadership Team, a Core Team responsible for project management and strategic direction, and business unit/department leads (See chart below).

Sample Structure for an Anchor Mission Working Group:[2]

[1] Ubhayakar S, Capeless M, Owens R, Snorrason K, Zuckerman D. "Anchor Mission Playbook". Chicago, IL and Washington, DC: Rush University Medical Center and The Democracy Collaborative; August 2017. Accessed August 19, 2018. https://democracycollaborative.org/sites/clone.community-wealth.org/files/downloads/Playbook-Web.pdf.
[2] ibid




**Anchor Mission Senior Leadership Team:**

Executive leaders in the organization with authority to direct high-level operations, budgetary, and HR decisions should have strategic oversight of Anchor Mission activities. This group might address Anchor Mission work in the context of previously scheduled meetings or in separately constituted Anchor Mission meetings.

The role of senior leadership includes:

- Serving as overall leaders of the Anchor Mission
- Supporting vision development and communicating to key stakeholders
- Developing strategy and approving measures and initiatives
- Acting as ambassadors of the mission with CBOs, business partners, etc.
- Holding the organization accountable for execution

Senior leadership should designate a **key leader** to drive the engagement and act as the spokesperson for Anchor Mission strategy. The ideal key leader will have the following characteristics:

- Ability to dedicate 5–10% of his/her time to the cause to mobilize mission, attend and lead meetings, update organization leadership, etc.
- Established relationships with senior leadership and credibility as a decision maker for the organization
- Relevant background experience in community health, community engagement, community economic development, and/or with other community-based organizations working to solve similar issues

**Core Team:**

The Core Team should include individuals directly involved in the Anchor Mission who oversee components of the initiative in its planning and implementation stages. Not all members of this team would need to be new hires. In fact, it would be valuable to have more of them be existing employees already familiar with the organization. The Core Team would work directly with business units to track progress on Anchor Mission initiatives.

The role of the Core Team includes:

- Implementing strategies and corresponding programs
- Tracking results and providing reports to the Anchor Mission Board

The Core Team should have a **project manager** to oversee the different business unit leads and to report to the leadership team regarding progress and milestones for the Anchor Mission strategy. The project manager will be in charge of coordinating existing efforts, driving new initiatives, and keeping the wheels turning. The ideal project manager will have the following characteristics:

- Ability to dedicate 75-100% of his/her time to the Anchor Mission
- Ability and opportunity to develop relationships with leadership and business unit leads
- Relevant background experience in community health, community engagement, community economic development, and/or with other community-based organization working to solve similar issues

**Business Unit Leads:**

Business unit leads would be responsible for overseeing and executing anchor mission initiatives within the business units identified as key to the AM strategy. These business units are likely to include the following departments: Human Resources; Supply Chain/Procurement; Treasury/Finance; Capital Projects; and Community Health Equity. The role of business unit leads includes:

- Ability to dedicate 10–15% of his/her time to the AM activities
- Driving design and mobilization of AM initiatives
- Engaging relevant stakeholders to support and approve initiatives
- Designing metrics, setting timelines, and conducting resource planning
- Monitoring and reporting progress of initiatives

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