WarriorCentricHealth®

PREPARED FOR Hospital Council Northern & Central California

FINANCIAL OPPORTUNITY BRIEF: SAN FRANCISCO · SAN MATEO · MARIN

More than 100,000 San Francisco, Marin, and Peninsula residents are military-connected. Most hospitals don't recognize them.

Here are the numbers in the three-county area:

38,576	61,722	100,298	5.5%
VETERANS	WARRIORS*	WARRIOR COMMUNITY**	% OF POPULATION

The market, county by county

County	Veterans	Warriors*	Warrior Community**	% of residents	Share of region
San Francisco	15,902	25,443	41,345	5.0%	41.2%
San Mateo	15,236	24,378	39,614	5.3%	39.5%
Marin	7,438	11,901	19,339	7.5%	19.3%
Region	**38,576**	**61,722**	**100,298**	**5.5%**	**100%**

*Includes Veterans, Active-Duty, Reserves, & Nat'l Guard. **Includes Warriors + Warrior family members.

Delivering warrior-conscious care to this large, underserved population also delivers ROI.

Becoming an Authorized Warrior Centric Health Facility™ gives HCNCC member systems the infrastructure to identify, engage, treat, and retain this population, delivering improved outcomes, regulatory compliance, and measurable growth in wallet share and new patients.

Sources: Census Reporter, ACS 2024 1-year county estimates; WCH planning multipliers.

THE FINANCIAL RETURN

Two channels of value for every participating system

Three-county reference scenario. WCH fees modeled as three deployments at $176,000 each per year.

CHANNEL 1
Increased wallet share

$2.2M

annual modeled uplift from 12,344 existing Warrior patients (20% provider share)

Value per existing Warrior	$175 / yr
Year 1 net after fees	$1.63M
Three-year net after fees	$4.9M
Return on WCH fees	309%

Drivers: referral retention, outpatient and specialty care, behavioral health, pharmacy.

Break-even: about 1,006 existing Warrior patients cover one $176K deployment.

CHANNEL 2
New patient acquisition

$13.9M

three-year contribution margin from 617 new Warriors a year (1% of the market).

Margin per new Warrior	$3,750/yr
Year 1 net after fees	$1.79M
Three-year net after fees	$12.3M
Return on WCH fees	777%

Retained cohorts compound each year



Request a facility- or system-specific financial assessment.

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