

Industry Overview

The healthcare and wellness cluster includes a dynamic and growing group of companies that provide preventive, curative, and rehabilitative services offered by healthcare providers, medical and specialty hospitals, kidney dialysis centers, nutrition and weight loss facilities, fitness centers, medical spas and massage facilities, public health and education, and other healthcare and wellness organizations. Extending beyond healthcare delivery, the cluster represents a continuum of businesses ranging from treating disease to a multidimensional and holistic approach that focuses on complete physical and mental health, social well-being, and disease prevention.



The nine-county Metro Denver and Northern Colorado¹ region is a leading healthcare and wellness hub. The region's health services industries are truly regional, serving not only surrounding areas of Colorado but several western states ranging from Montana to New Mexico. The region has a large concentration of healthcare and wellness facilities with more than 192,290 healthcare and wellness workers in nearly 18,160 companies across the region. The healthcare and wellness cluster propels the region's economy forward by attracting substantial resources and promoting company expansions from which patients, educational and research institutions, companies, research and development, and the community all derive significant benefits.

One of the key characteristics of the healthcare and wellness industry is its resiliency to economic cycles, which continues to drive job growth as a result of several key trends. Colorado's health insurance landscape is undergoing rapid change, and the pace accelerated in 2014. An estimated 500,000 Coloradans are expected to gain insurance through the Affordable Care Act, driven by private insurance enrollment through Connect for Health Colorado, public insurance enrollment in Medicaid, and the expanding health benefits in both. This will also drive further collaboration and cooperation among various healthcare and wellness facilities across the region for specialized services, research, workforce, and facilities.

Another contributing factor is increasing demand for healthcare services, largely due to an aging and growing population. By 2040, Colorado's population ages 65 and older is projected to double to 1.5 million. This demographic shift toward an older population with the aging of the baby boomer generation will generate economic activity based on increased demand for hospital and nursing care, medical services, and long-term and at-home services.

In addition, the digital healthcare infrastructure, created by electronic health records and software solutions, has greatly improved the way patient care is delivered and compensated. Improvements in the digital healthcare infrastructure have also provided the ability to share patient records with other providers. Lastly, providers are moving toward integrated healthcare to increase efficiencies and mitigate risks by establishing continuity of care. The integrated healthcare approach is changing the way individuals prevent illness and treat diseases. Improved medical practices, holistic approaches, and new intellectual and spiritual philosophies have fostered the movement toward an integrated approach to healthcare.

Healthcare and Wellness Economic Profile

The healthcare and wellness cluster includes the offices of physicians, dentists, chiropractors, optometrists, mental health practitioners, physical and speech therapists, podiatrists, and other health practitioners. The cluster includes hospitals ranging from general medical, surgical, and psychiatric to substance abuse and specialty care, and includes centers focused on family planning, outpatient mental health and substance abuse, kidney dialysis, diagnostic imaging, and emergency care. Companies focused on nursing care, assisted

¹ The nine-county Metro Denver and Northern Colorado region consists of Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, Jefferson, Larimer, and Weld Counties.

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living, and long-term care and businesses that provide services for individuals, families, and the elderly are also included. The cluster includes home health and recreation equipment rental, fitness and recreation facilities, diet and weight reducing services, and massage and yoga services. Companies that manufacture ophthalmic goods, sports and athletic equipment, and outerwear and retailers engaged in vitamins and nutrition supplements are also included. The cluster includes government agencies engaged in the planning, administration, and coordination of public health programs and services. The healthcare and wellness cluster consists of 53, six-digit North American Industry Classification System (NAICS) codes.

With direct employment of 192,290 healthcare and wellness workers, the nine-county region ranked 13th in absolute employment out of the 50 largest metro areas in 2014. The region ranked 30th for healthcare and wellness employment concentration. About 72 percent of Colorado's healthcare and wellness cluster employees worked in the region.

Healthcare and Wellness Employment and Company Profile, 2014

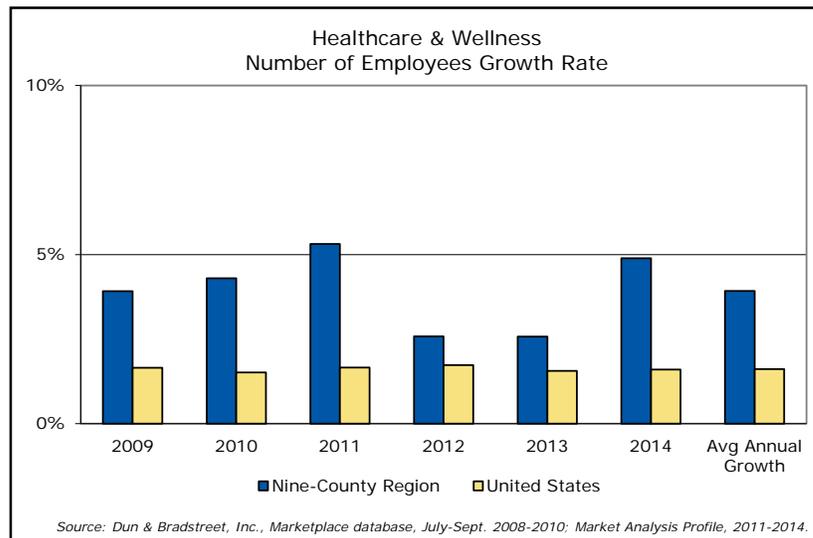
	Nine-County Region	United States
Direct employment, 2014	192,290	16,877,720
Number of direct companies, 2014	18,160	1,348,870
One-year direct employment growth, 2013-2014	4.9%	1.6%
Five-year direct employment growth, 2009-2014	21.2%	8.3%
Avg. annual direct employment growth, 2009-2014	3.9%	1.6%
Direct employment concentration	10.4%	11.6%

Sources: Dun & Bradstreet, Inc. Marketplace database, July-Sept. 2008-2010; Market Analysis Profile, 2011-2014; Development Research Partners.

Healthcare and Wellness Employment

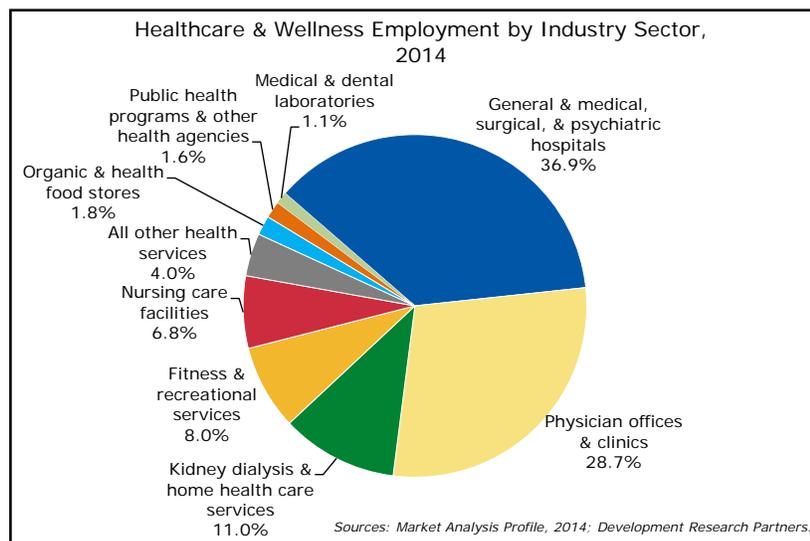
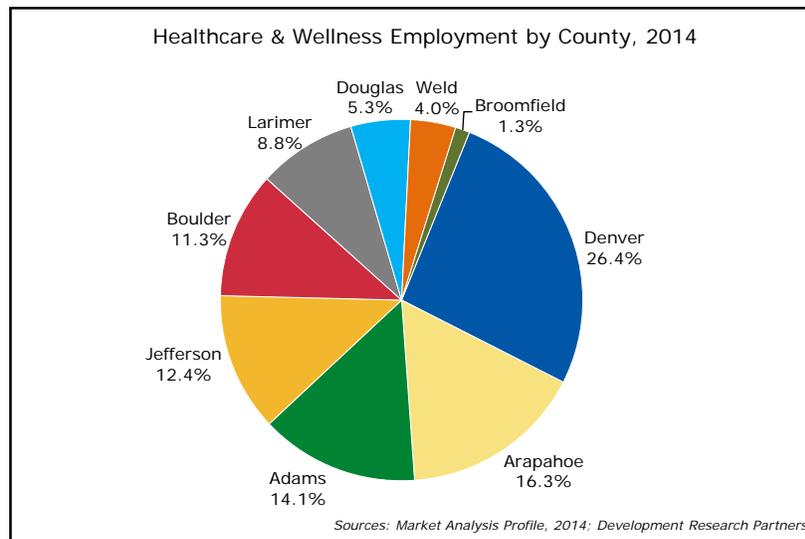
The nine-county region's healthcare and wellness employment (192,290 workers) rose 4.9 percent in 2014, compared with the previous year's level, adding nearly 8,980 new jobs over the same period.

About 18,160 healthcare and wellness companies operated in the nine-county region in 2014. Approximately 82 percent of the region's healthcare and wellness companies employed fewer than 10 people, while 0.4 percent employed 250 or more.



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Major Healthcare and Wellness Companies

- 24 Hour Fitness
www.24hourfitness.com
- American Medical Response
www.amr.net
- Banner Health
www.bannerhealth.com
- Better Bodies Fitness Centers
www.betterbodiescolorado.com
- Boulder Community Health
www.bch.org
- Boulder Center for Sports Medicine
www.bouldersportsmedicine.org
- Centura Health
www.centura.org
- HSS Inc.
<http://hss-us.com>
- Kaiser Permanente Colorado
www.kaiserpermanente.org
- Kindred Healthcare, Inc.
www.kindredhealthcare.com
- InnovAge
www.myinnovage.org
- Life Care Centers of America
www.lcca.com
- Longmont United Hospital
www.luhcares.org
- Massage Envy
www.massageenvy.com

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Major Healthcare and Wellness Companies Cont'd

- Children's Hospital Colorado
www.childrenscolorado.org
- Comfort Dental
www.comfordental.com
- CorePower Yoga
www.corepoweryoga.com
- Craig Hospital
www.craighospital.org
- DaVita Inc.
www.davita.com
- Denver Health and Hospital Authority
<http://denverhealth.org>
- Gaiam, Inc.
www.gaiam.com
- HCA-HealthONE LLC
www.healthonecares.com
- HealthGrades, Inc.
www.healthgrades.com
- National Jewish Health
www.nationaljewish.org
- Natural Grocers by Vitamin Cottage
www.naturalgrocers.com
- Platte Valley Medical Center
www.pvmc.org
- Quest Diagnostics
www.questdiagnostics.com
- Rocky Mountain Poison & Drug Center
www.rmpdc.org
- Rudi's Organic Bakery
www.rudisbakery.com
- SCL Health System (formerly Exempla Healthcare)
www.sclhealthsystem.org
- SlimGenics, LLC
www.slimgenics.com
- University of Colorado Health
www.uchealth.org

Major Healthcare and Wellness Foundations and Community-Based Organizations

- A.V. Hunter Trust Inc.
<http://avhuntertrust.org>
- Anschutz Family Foundation
www.anschutzfamilyfoundation.org
- Arapahoe House
www.arapahoehouse.org
- Aurora Mental Health Center
www.aumhc.org
- Belle Bonfils Memorial Blood Center
www.bonfils.org
- Caring for Colorado Foundation
www.caringforcolorado.org
- Catholic Health Initiatives
www.catholichealthinit.org
- Children's Hospital Colorado Foundation
www.childrenscoloradofoundation.org
- Clinica Family Health Services
www.clinica.org
- Colorado Behavioral Health Council
www.cbhc.org
- Colorado Community Health Network
www.cchn.org
- The Colorado Health Foundation
www.coloradohealth.org
- The Colorado Trust
www.coloradotrust.org
- Community First Foundation
www.communityfirstfoundation.org
- The Denver Health Foundation
www.denverhealthfoundation.org
- The Denver Hospice
www.thedenverhospice.org
- El Pomar Foundation
www.elpomar.org
- Helen K. & Arthur E. Johnson Foundation
www.johnsonfoundation.org
- Kenneth King Foundation
www.kennethkingfoundation.org
- Jefferson Center for Mental Health
www.jeffersonmentalhealth.org
- Jewish Family Service of Colorado
<http://jewishfamilyservice.org>
- LiveWell Colorado
<http://livewellcolorado.org>
- Mental Health Center of Denver
www.mhcd.org
- Mental Health Partners
www.mhpcolorado.org
- North Colorado Health Alliance
www.northcoloradohealthalliance.org
- Rose Community Foundation
www.rcfdenver.org
- Visiting Nurse Association of Colorado
www.vnacolorado.org
- Western Dairy Association
www.westerndairyassociation.org

Major Healthcare and Wellness Government and Research Facilities

- CO Department of Agriculture
www.colorado.gov/ag
- CO Department of Human Services
www.colorado.gov/CDHS
- CO Department of Public Health & Environment
www.cdphe.state.co.us
- Tri-County Health Department
www.tchd.org
- University of CO Anschutz Medical Campus
www.ucdenver.edu
- U.S. Dept. of Agriculture
www.usda.gov
- U.S. Dept. of Health & Human Services Health Resources & Services Admin.
www.hrsa.gov
- U.S. Dept. of Veterans Affairs
www.va.gov

2014 Industry Highlights

Anschutz Medical Campus and Fitzsimons Life Science District

The nine-county region is a healthcare and wellness powerhouse with cutting-edge research and development facilities, unmatched talent, and state-of-the-art amenities. The region is home to internationally renowned clinical systems, institutions, and organizations including the Fitzsimons Life Science District and the adjacent Anschutz Medical Campus in Aurora. When complete, the \$5.2 billion project encompassing 578 total acres and more than six million square feet of new real estate will be the largest medical-related redevelopment in the nation and the world's only completely new research, education, and patient care complex. The campus is home to the schools and colleges of Medicine, Nursing, Dental Medicine, Pharmacy, and Public Health. According to the University of Colorado Denver, CU Anschutz contributed more than \$2.6 billion to Colorado's economy between 2012 and 2013 and employment increased by 4,200 jobs over this period of time. With two world-class research hospitals—the University of Colorado Hospital (UCH) and Children's Hospital Colorado—the campus will total 18 million square feet and employ more than 44,000 people at full buildout. A number of facilities expanded in 2014:

- Located adjacent to the Anschutz Medical Campus is the U.S. Department of Veterans Affairs (VA) Eastern Colorado Healthcare System hospital and facilities. The VA's hospital and facilities in Aurora house the VA Schizophrenia Research Center—one of three in the VA system nationwide—the Mental Illness Research, Education, and Clinical Centers, and conduct research on best practices and care coordination for veterans. Construction began in 2011 on a new VA Hospital that will replace the existing facility in Denver and will be completed in 2016. The new 1.2 million-square-foot VA Hospital will include a spinal-cord injury center and community living center. At buildout, the VA Hospital is expected to employ about 2,000 people and serve nearly 83,000 veterans annually.
- The University of Colorado Health (UCHealth) plans to build a \$63 million Center for Personalized Medicine and Biomedical Informatics on the Anschutz Medical Campus. The Center will provide improved healthcare through DNA and molecular testing and will provide services to the Children's Hospital Colorado locations throughout Colorado and serve as a resource for the UCHealth system. Over the next five years, the University of Colorado School of Medicine and Children's Hospital Colorado will add clinicians, genetic counselors, advanced practice nurses, DNA banks, a data warehouse, and analytics tools.
- UCH began construction of four previously unfinished floors in the 12-story expansion tower at the Anschutz Medical Campus. Three of the floors will be acute care floors for 108 beds and the fourth floor will hold a 24-bed intensive care unit. The \$32 million project is slated for completion in early 2015.
- Colorado cancer researchers and medical doctors from the University of Colorado and Colorado State University partnered to conduct a \$200,000 feasibility study for a proposed \$300 million center at CU Anschutz. The center would be home to the nation's first carbon-ion radiotherapy facility. The collaborators signed a memorandum of understanding to pursue the project with Poudre Valley Hospital in Fort Collins and carbon-ion radiotherapy pioneers at the National Institute of Radiological Sciences in Japan.
- The Anschutz Medical Campus also includes facilities for University Physicians, Inc., the University of Colorado Cancer Center, the Barbara Davis Center for Childhood Diabetes, the Eleanor Roosevelt Institute, and the Webb-Waring Center.

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Northern Colorado Healthcare Assets

UCHealth provides evidence-based healthcare and wellness services in Colorado, Nebraska, and Wyoming and includes UCH in Aurora, Poudre Valley Hospital in Fort Collins, Medical Center of the Rockies in Loveland, Mountain Crest Behavioral Healthcare Center, Colorado Health Medical Group, and other clinics and outpatient services.

Located 50 miles north of Denver, the North Colorado Medical Center (NCMC) in Greeley is rated nationally among the top 2 percent of hospitals for clinical quality. NCMC's specialties in cardiology, pulmonary, gastroenterology, and critical care are among the top in the nation. NCMC serves as a regional medical center with community-based and specialty services covering southern Wyoming, western Nebraska, western Kansas, and northeastern Colorado. Designated as a Level II Trauma Center, NCMC offers patients state-of-the-art technology such as iCare and a telehealth program.

The McKee Medical Center, an acute-care hospital serving the Loveland community, is a leader in healthcare innovation through its latest cancer treatments and offers a full range of inpatient and outpatient services, and is a regional center for robotic surgery. McKee Medical Center also offers an intelligent obstetrics program, a computerized system designed to reduce the chances of complications during labor and delivery.

Northern Colorado's healthcare and wellness organizations expanded their presence in 2014.

- UCHealth plans to build a 24-hour emergency center at its Harmony Campus in Fort Collins. The \$12.3 million, 16,580-square-foot emergency center will have 12 private exam rooms, computed tomography, ultrasound, basic X-ray services, a retail pharmacy, and an outpatient laboratory.
- Banner Health continued construction on its new Fort Collins hospital, part of a 28-acre campus that will also include an outpatient clinic and medical office building. The Banner Fort Collins Medical Center will include an emergency department, a 24-bed inpatient unit, labor and delivery rooms, medical imaging, surgical services, and laboratory services. The hospital is slated to open in 2015.
- Poudre Valley Hospital plans to expand and renovate its existing hospital. The \$102 million project includes the construction of a two-story building with a new emergency department, expanded orthopedic wing, and a new laboratory. The building will house a helicopter landing pad on the roof and a new parking lot will be added.

Major Project Updates and Facility Expansions

A number of major nine-county region hospital projects and facility expansions were either completed or moved forward in 2014.

- The new National Jewish Health-Saint Joseph Hospital opened in December. The \$623 million, 831,000-square-foot facility replaced the hospital's existing facility and includes a hybrid operating room that will allow physicians to treat major cardiac problems using both invasive and non-invasive procedures and alleviate the need to move patients between operating rooms during surgery.
- Swedish Medical Center will expand its stroke and neuroscience programs. The \$50 million project includes renovations to 28,000 square feet of existing space and adding 65,000 square feet, including the addition of 39 beds specific to the neuroscience program, a new neurocritical care unit, and two additional floors to the south tower.
- Littleton Adventist Hospital plans to renovate and expand its existing building. The \$30 million project includes expansion of the pre-operation and post-operation surgery areas, interventional radiology services, and cardiac services. The hospital will also install new technology for radiation and cardiac services, as well as build more conference space. The hospital celebrated its 25th anniversary in 2014.
- Construction continued on Centura Health's St. Anthony North Health Campus in Westminster. The 350,000-square-foot project includes a Level III trauma center and emergency department, an ambulatory surgery center with inpatient surgery capabilities, a women's health center, outpatient diagnostics and treatment center, and inpatient beds. The facility will incorporate the company's health neighborhood approach and is slated for completion in early 2015.
- Platte Valley Medical Center opened in Commerce City and will serve as the first primary care medical building to open in the Reunion community. The \$3.7 million, 12,000-square-foot center provides access to four medical practices including Eagle Ridge Medical Family Medicine, Integrative Internal Medicine, Premier Pediatrics, and Alcott Women's Care.

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- Jefferson County will be the site of a small, new hospital, located at the corner of Wadsworth Boulevard and Coal Mine Avenue. The new building will be a boutique hospital, a hospital designed for personalized care and high-volume surgeries.

Key Company Announcements

Notable healthcare and wellness company expansions and announcements in 2014 included:

- Centura Health opened three new health and wellness centers in north Denver as part of the provider's new neighborhood health program. The centers, located in Dacono, Thornton, and Westminster, offer primary care, specialty services, diagnostic imaging, and wellness services.
- Denver-based InnovAge opened its newest senior services center in Denver. The 36,000-square-foot facility will employ 200 people and could service 1,000 seniors. The company currently operates five locations along the Front Range and offers health, dental, vision, psychiatric care, X-ray services, and physical therapy services.
- SCL Health relocated its headquarters to Broomfield, leasing an additional 104,683 square feet of space. SCL relocated the human resources, finance, and legal departments, as well as the executive and corporate communications office from downtown Denver. The move will retain 920 jobs at the Broomfield campus and allow the company to expand by 150 positions in the future.
- The Stout Street Health Center opened in Denver, the only facility of its kind in the country. The \$35 million, 53,190-square-foot facility integrates total healthcare with housing for homeless individuals and allows the organization to serve 50 percent more people. The Center includes general physician care, vision, dental, pharmacy, mental health, and addiction counseling services.
- Boulder Brands Inc. plans to expand its downtown Boulder corporate headquarters, more than doubling its current location by 25,000 square feet. The expansion will allow for an additional 50 employees and an "innovation kitchen" for new idea development, quality control, and education and training.
- Louisville-based Door to Door Organics Inc. secured more than \$25 million in Series B funding. The funding will help the company accelerate expansion into new markets, resulting in the addition of new employees in operations, merchandising, and technology.
- Purely Elizabeth, a local natural and organic foods company, relocated its headquarters from New York City to Boulder. The company's move was motivated by a need to be closer to their manufacturing center and to enter into the local organic foods network. After the relocation, the company secured a contract with Target to sell their products in 1,789 stores nationwide.

Health Tourism Announcements

The nine-county region is a growing health tourism hub, offering high-quality healthcare facilities, a highly skilled workforce, and specialized medical services. Notable developments in 2014 included:

- Construction continued on Craig Hospital's \$90 million expansion and renovation project. Phase 1 of construction was completed in 2014 with the new addition and PEAK Center open. Phase 2 of construction began in August 2014, which will finish the interiors of the new fourth floor Spinal Cord Unit, the spinal cord injury therapy gym, and Adaptive Technology Lab. The project is slated for completion in 2016.
- The town of Estes Park broke ground on a \$30 million health and wellness facility on land adjacent to the Stanley Hotel. The Stanley Hotel/Anschutz Medical Center for Wellness will create 70 new jobs and includes a 15,000-square-foot training center, a wellness center, and 13,000 square feet for physician lodging.
- The University of Colorado Anschutz Health and Wellness Center (AHWC) was featured in an ABC documentary series. The Center offers some of the nation's most advanced research, focusing on a comprehensive wellness approach, including weight loss and management, fitness, and nutrition. Following the documentary, it started the AHWC Destination Weight Loss program, which offers a weeklong boot camp in Denver and continued weight loss and wellness goal monitoring remotely for an entire year.
- The Colorado Center for Reproductive Medicine (CCRM) is one of the nation's leading fertility clinics, providing a wide variety of treatments ranging from basic infertility care to the most advanced technology available. Two-thirds of CCRM's patients travel to Colorado from other states and countries for treatment. It is internationally recognized for success rates and scientific achievements in the field of reproductive endocrinology.

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- National Jewish Health is a worldwide leader in treating patients with respiratory, cardiac, immune, and related disorders, and for groundbreaking medical research. Founded in 1899 as a nonprofit hospital, National Jewish Health remains the only facility in the world dedicated exclusively to these disorders. Roughly 30 percent of National Jewish's patients come from out-of-state to receive pulmonology care.
- The Medical Center of Aurora is a leader in cardiovascular care and hosts the largest atrial fibrillation center in the Rocky Mountain region. In addition, the center's main campus and Centennial Medical Plaza are accredited chest pain centers by the Society of Chest Pain Centers and operate a state-of-the-art heart care tower on its main campus.

Major Collaborations and Partnership Activity

2014 was notable for increased partnerships and collaborations among the region's healthcare and wellness organizations.

- DaVita HealthCare Partners Inc. and Centura Health collaborated to improve patient healthcare. The two companies will offer differentiated healthcare delivery models called Colorado Health Neighborhoods, which are intended to lower patient costs and optimize healthcare value. The partnership provides primary care physicians, specialists, and Centura facilities with tools such as disease management and patient care coordination.
- National Jewish Health and SCL Health signed a joint operating agreement that will allow healthcare providers to handle clinical care together at the new National Jewish Health-Saint Joseph Hospital. Under the agreement, National Jewish will provide outpatient services and SCL Health will provide the inpatient services.
- HCA-HealthONE partnered with Nashville, Tenn.-based Sarah Cannon Cancer Network of Excellence to increase access to clinical tests and improve coordinated cancer care. The initiative is designed for patients to gain access to innovative therapies and clinical trials and enhance patient navigation across facilities.
- Three SCL Health System's hospitals based in Metro Denver successfully connected to the health information exchange (HIE) network at the Colorado Regional Health Information Organization. Good Samaritan Medical Center in Lafayette, Lutheran Medical Center in Wheat Ridge, and Saint Joseph Hospital in Denver provide care to more than 100,000 residents. The HIE provides access to health information on patients such as hospital discharge notifications, lab test results, X-ray and other imaging reports, and referral information to doctors.

Cross-Cluster Convergence

The nine-county region is characterized by its network of collaboration, innovation centers, and unique assets that lead to cross-cluster convergence. The healthcare and wellness industry combines these regional assets to strengthen partnerships and enhance growth opportunities across industries such as digital health and IT-software.

- Metro Denver is an emerging digital health corridor. Founded in July 2012, the Denver South Economic Development Partnership's PRIME Health Collaborative is a growing statewide community of 650+ health care administrators, physicians, technologists, academics, entrepreneurs, and investors dedicated to supporting innovation and technology in patient care with the goal of improving health and lowering healthcare costs. The Collaborative is a central clearinghouse for Digital Health—the convergence of the digital and genetics revolutions with bioscience, healthcare and wellness, and information technology-software—resources and overall cluster resources. In 2014, the Collaborative held a number of important events showcasing the Digital Health Corridor.
- The University of Colorado launched the first curriculum focused on digital health, using the business-academic partnership. The program will help prepare the newest generation and newest specialty of technology workers in Colorado.
- Boulder-based Kindara launched Wink, a wireless fertility thermometer to help women easily record their basal body temperature readings. Wink synchronizes with Bluetooth technology to the Kindara fertility app on a user's mobile devices and provides an integrated fertility charting experience.
- Two Metro Denver technology companies—Highlands Ranch-based Zen Planner and Denver-based PaySimple—partnered to help fitness and dance studios manage their business using cloud-based infrastructure. Zen Planner focuses on scheduling, booking, and business management software, which connects to PaySimple's payment-processing and payments software.

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- Aurora-based Analytical Decision Services LLC designed a program to simulate how healthcare facilities can improve efficiencies and manage an influx of patients. The company created a four-dimensional portrayal of a healthcare system and can add and subtract different factors that will analyze the way the organization handles patients and care.
- Centennial-based Thinklabs designed a new digital stethoscope, which is compatible with iPhone and iPad technology. The Thinklabs One stethoscope is Bluetooth compatible for wireless transmission, has an earphone jack that is compatible with different headphone models, and has volume control to enhance the sound up to 100 times louder than the traditional model.

Research and Development Awards

The region's healthcare and wellness companies and organizations received notable awards in 2014.

- The Centers for Medicare and Medicaid Services awarded Colorado health policy leaders \$65 million to develop a plan to integrate physical and mental healthcare. The State Innovation Model funding is designed to provide support to states for the development and testing of state-based models for multi-payment and healthcare delivery system transformation aimed at improving health system performance. Colorado's model, the Statewide Health Innovations Fostering Transformation program, supports the formation of integrated primary care providers, developed within the framework of the state's existing Medicaid Accountable Care Collaborative.
- DaVita Kidney Care, a division of DaVita Healthcare Partners Inc., received two Dorland Health "Case In Point" Platinum awards. The awards are given to companies that have the most successful and innovative case-management programs working to improve healthcare. DaVita's model includes collaborating with patients, physicians, health systems, Accountable Care Organizations, and payers to provide integrated care. The two programs to receive the awards were Patient Pathways and VillageHealth.
- The Caring for Colorado Foundation awarded \$2.7 million in grants to 51 mental, oral, and safety-net healthcare organizations across Colorado. The beneficiaries included Western slope schools, behavioral health and programs for disadvantaged students, and extended health coverage for the uninsured.
- Denver-based myStength.com received \$1.5 million from the Colorado Health Foundation to develop an online behavioral health program that offers mental-health checks, affirmations, and other help. The funding will allow the company to increase capacity and bring the e-platform to public and private clients.

Industry Infrastructure Support

The nine-county region is home to numerous organizations that promote wellness.

- Colorado hosted the fourth annual USA Pro Cycling Challenge in summer 2014. The 550-mile route through eight host cities from Aspen to Denver generated \$130 million in economic impact for the state. Riders from 16 international, professional teams took place in the race, challenging the course's 40,000 feet of vertical climbing and technical descents.
- Colorado's northeastern plains communities hosted the third annual Pedal The Plains bicycle tour in 2014. More than 1,000 registered cyclists participated in the event to celebrate the agricultural roots and frontier heritage of the state's Eastern Plains. The three-day ride covered more than 170 miles and showcased the host communities of Wiggins, Fort Morgan, and Sterling.
- Flat 14ers is an initiative to encourage children, families, teachers, and community members to increase their levels of physical activity by climbing virtual 14,000-foot mountain peaks (14ers). The online tracking system provides individuals an easy and fun way to become active and stay active by converting minutes of physical activity such as running, playing basketball, cycling, or walking into steps toward reaching the summit of a 14er. The initiative is part of the Tri-County Health Department's Communities Putting Prevention to Work Grant with partners including school districts, parks and recreation agencies in Adams, Arapahoe, and Douglas Counties, CBS4, America On the Move, and Children's Hospital Colorado.
- The Colorado Health Foundation (CHF) is one of the largest health-focused foundations in the country, providing grants to nonprofits with the focus on encouraging healthy living. Located in Denver, CHF works to increase accessibility to quality healthcare, provides graduate medical education to increase the healthcare workforce, and works with foundation partners to address health issues in Colorado. CHF hosts the annual Colorado Health Symposium which is one of the leading national health policy conferences in the nation.

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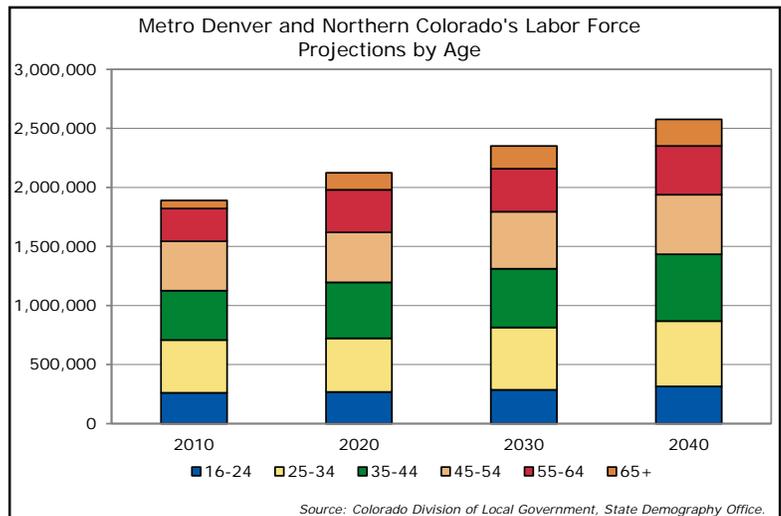
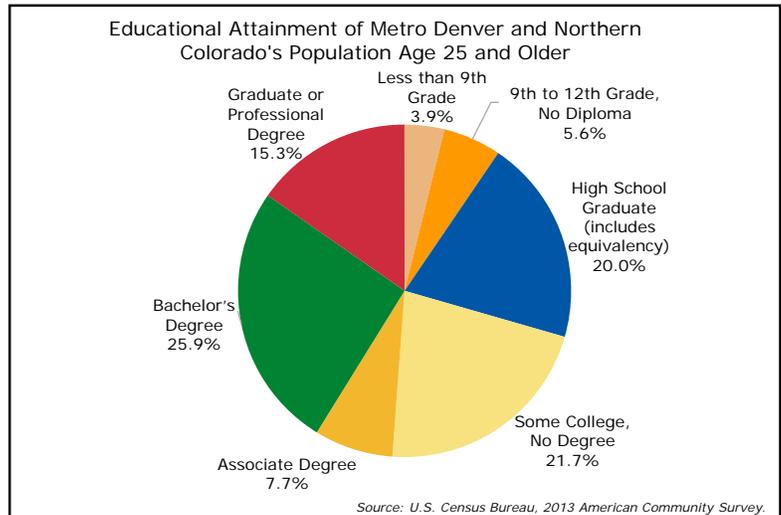
- The Colorado Trust was formed in 1985 as a dedicated foundation to advance the health and well-being of Coloradans. The Trust collaborates with individuals, organizations, and communities across the state to expand health coverage and improve the healthcare system. Through grant support, the Trust is dedicated to achieving access to health for all Coloradans by 2018.

Healthcare and Wellness Workforce Profile

Many companies choose locations because of the available workforce. With nearly half of the nine-county region's 3.6 million residents under the age of 35, employers can draw from a large, young, highly educated, and productive workforce. Of the region's adult population, 41.2 percent are college graduates and 90.5 percent have graduated from high school. The state has the nation's second-most highly educated workforce as measured by the percentage of residents with a bachelor's degree or higher.

The attractiveness of the region draws new residents through migration. The region's population is expected to grow 53.3 percent from 2010 to 2040, driving a 36.3 percent increase in the region's labor force over the same period. It is important to note the changing composition of the workforce supply as the baby boomers begin to retire, which will pose implications for businesses whose employee pool includes significant numbers of these workers.

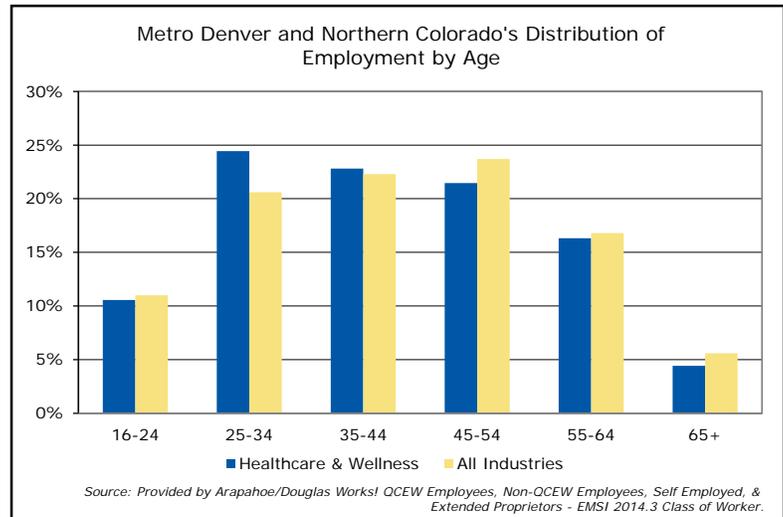
The nine-county region's healthcare and wellness industry cluster employs 192,290 people and includes a large pool of talented, well-educated, and highly skilled workers. Compared with the age distribution across all industries, the healthcare and wellness cluster has a larger share of employees that are between the ages of 25 and 44 years old.



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The healthcare and wellness workforce supply consists of four main components: those currently working in the industry; those doing a similar type of job in some other industry; the unemployed; and those currently in the education pipeline. The Metro Denver and Northern Colorado Occupation & Salary Profile below includes the 10 largest healthcare and wellness occupations in the region. For these 10 largest occupations, the chart details the total number of workers employed in that occupation across all industries, the number of available applicants that would like to be working in that occupation, the number of recent graduates that are qualified for that occupation, and the median and sample percentile annual salaries.



Wages

The 2013 average annual salary for a healthcare and wellness worker in the nine-county region was \$53,440, compared with the national average of \$52,690. Total payroll for the healthcare and wellness cluster in the region reached nearly \$9.8 billion in 2013.

Metro Denver and Northern Colorado Healthcare and Wellness Occupation & Salary Profile, 2014

10 Largest Healthcare and Wellness Occupations in Metro Denver and Northern Colorado	Total Working Across All Industries (2014)	Number of Available Applicants (2014)	Number of Graduates (2013)	Median Salary	10th Percentile Salary	25th Percentile Salary	75th Percentile Salary	90th Percentile Salary
1. Registered nurses	31,803	374	1,938	\$69,742	\$50,523	\$58,490	\$83,117	\$93,350
2. Personal care aides	20,808	572	182	\$20,613	\$17,160	\$18,595	\$22,734	\$24,294
3. Nursing assistants	12,652	1,076	1,504	\$28,038	\$22,443	\$24,960	\$32,302	\$36,338
4. Home health aides	10,103	477	209	\$23,192	\$17,992	\$20,218	\$28,101	\$32,531
5. Business operations specialists, all other	32,981	792	77	\$69,930	\$36,067	\$50,024	\$92,622	\$120,078
6. Receptionists & information clerks	16,313	2,349	0	\$30,139	\$20,550	\$25,168	\$36,338	\$43,618
7. Medical assistants	7,162	779	1,365	\$34,050	\$26,603	\$29,702	\$38,480	\$44,242
8. Secretaries & administrative assistants, except legal, medical, & executive	49,635	650	71	\$36,026	\$23,587	\$29,037	\$43,992	\$51,979
9. Clinical, counseling, & school psychologists	6,589	17	2,261	\$55,723	\$41,080	\$48,214	\$65,749	\$72,779
10. Medical secretaries	5,750	352	173	\$34,216	\$24,814	\$29,078	\$39,853	\$46,467

Notes: The number of available applicants is a point-in-time measurement of the number of people who have registered in Colorado's workforce development system's statewide database, Connecting Colorado, as being able and available to work in a particular occupation. Results should be interpreted with caution since registration in Connecting Colorado is self-reported. In addition, the skills rubric may assign up to four occupation codes for each registrant. Therefore, the number of available applicants could be inflated. Source: Provided by Arapahoe/Douglas Works! QCEW Employees, Non-QCEW Employees, Self Employed, & Extended Proprietors - EMSI 2014.3 Class of Worker.

Education & Training

Colorado's higher education system provides an excellent support system for businesses in the region. There are 28 public higher education institutions in Colorado, of which seven four-year and six two-year public institutions offering comprehensive curricula are located in the nine-county region. In addition, there are more than 100 private and religious accredited institutions and nearly 340 private occupational and technical schools offering courses in dozens of program areas throughout the state. Although not exhaustive, a list of the major, accredited educational institutions with the greatest number of graduates for each of the 10 largest healthcare and wellness occupations in the nine-county region are included below. A directory of all higher education institutions with corresponding websites may be accessed via <http://higher.ed.colorado.gov>.

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- Colorado School of Traditional Chinese Medicine
www.cstcm.edu
- Concorde Career College – Aurora
www.concorde.edu
- Emily Griffith Technical College
www.emilygriffith.edu
- Front Range Community College
www.frontrange.edu
- Institute of Taoist Education and Acupuncture, Inc.
<http://itea.edu>
- Jones International University
www.jiu.edu
- Metropolitan State University of Denver
www.msudenver.edu
- Pima Medical Institute – Denver Campus
www.pmi.edu
- Regis University
www.regis.edu
- Southwest Acupuncture College
www.acupuncturecollege.edu
- University of Colorado Boulder
www.colorado.edu
- University of Colorado Denver
www.ucdenver.edu
- University of Colorado Denver School of Medicine
www.medschool.ucdenver.edu
- University of Northern Colorado
www.unco.edu

Key Reasons for Healthcare and Wellness Companies to Locate in the Nine-County Region

The region is a top healthcare and wellness location offering:

1. A robust culture of health and wellness

- Colorado is the leanest state with the nation's lowest rate of adult obesity (21.3 percent). (Trust for America's Health, 2014; Robert Wood Johnson Foundation, 2014)
- Colorado has the highest participation in physical activities with nearly 62 percent of the state's adults participating in 150 minutes of moderate or vigorous physical activity per week. (The Henry J. Kaiser Family Foundation, 2014)
- Colorado ranked as the eighth-healthiest state in the nation and had the lowest rates of obesity, physical inactivity, and diabetes. (United Health Foundation, 2014)
- Metro Denver ranked as the fourth-fittest metro area in the nation in 2014. Denver's high percentage of residents participating in physical activity, and low obesity and cardiovascular disease rates contributed to its high rank. (American College of Sports Medicine, 2014)
- Colorado has the fourth-highest percentage of state land area devoted to the National Forest System. The state offers access to more than 50 national parks and wilderness areas, 42 state parks, and the greatest number of 14,000-foot peaks in the nation that support a healthy, active lifestyle. (U.S. Forest Service, 2014; Colorado State Parks, 2014)
- The park facilities in Denver and Aurora ranked among the top 10 best in the nation in 2014. (The Trust for Public Land, 2014)
- The City and County of Denver has the nation's largest city park system with more than 200 parks and more than 34,000 acres of parks located in the nearby mountains. (Metro Denver Economic Development Corporation)
- More than 100 public and private golf courses are located throughout Metro Denver. In addition, 11 world-class ski resorts are within 100 miles. (Metro Denver Economic Development Corporation)
- Boulder and Fort Collins ranked among the top five metro areas for residents' overall health and well-being. Colorado ranked seventh for its residents' overall well-being. (Gallup-Healthways, 2014)
- Douglas County ranked as the healthiest county in Colorado. Boulder (fourth), Broomfield (ninth), and Larimer (10th) were also included in the top 10. (University of Wisconsin Population Health Institute, 2014)
- Colorado scored among the top 10 in the nation on four of the six healthy aging indicators. The state's older adults had the highest rate of physical activity of any state and ranked eighth for immunization rates. (Colorado Health Foundation, 2014)
- Colorado ranked as the sixth-healthiest state for adults ages 65 years and older. Colorado's seniors have the second-lowest prevalence of obesity, high rates of physical activity, low percentage of hospital deaths, and low premature death rate. (United Health Foundation, 2014)
- Colorado's nearly 350 organically-certified farmers, ranchers, and food processors account for approximately 10 percent of overall U.S. sales of organic products. Colorado ranked as the nation's

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largest producer of organic wheat and ranked third in organic millet and organic lettuce production. (Colorado Department of Agriculture, 2014)

2. The ability to recruit and retain a healthy, skilled, and productive workforce

- Healthy employees are more productive, have less absenteeism, and cost an average of \$4,000 less each year in healthcare costs than unhealthy employees. (University of Michigan Health Management Research Center, 2014)
- Of Colorado's adult population, nearly 38 percent has completed a bachelor's or higher-level degree, making Colorado the second-most highly educated state in the nation behind Massachusetts. (U.S. Census Bureau, 2013 American Community Survey)
- Colorado ranked ninth in the number of science and engineering graduate students per 1,000 individuals ages 25 to 34 years old in 2011. (National Science Foundation, 2014)
- Denver ranked as the seventh-best city for millennials (ages 25-34) out of 25 major cities with a population over 1 million in 2014. (Niche.com, 2014)
- The Denver-Aurora-Broomfield MSA was named to the top 10 list of "Best Big Cities for Jobs 2014." (*Forbes*, 2014)
- Denver ranked as the ninth-best city for college graduates and received accolades for its highly educated population, moderate cost of living, and higher-than-average wages. (NerdWallet, 2014)
- The Colorado Rural Health Center's Colorado Provider Recruitment program focuses on expanding the primary care workforce throughout Colorado's rural and urban underserved healthcare communities (Colorado Rural Health Center, 2014)

3. The convergence of health-related education, research, and application

- The University of Colorado School of Medicine ranked 13th nationally for primary care and 40th among research-oriented programs. Three School of Medicine specialties ranked among the top 10 including family medicine (fifth), pediatrics (sixth), and rural medicine (ninth). (*U.S. News & World Report*, 2014)
- Three Metro Denver institutions ranked among the nation's "Best Online Graduate Nursing Programs." The College of Nursing at the University of Colorado ranked 10th, Loretto Heights School of Nursing at Regis University ranked 37th, and American Sentinel in Aurora ranked 41st. (*U.S. News & World Report*, 2014)
- The University of Colorado's School of Medicine graduates about 150 medical students per year and offers programs in dental medicine, medicine, nursing, pharmacy, and public health. (University of Colorado, 2014)
- The University of Colorado Denver and Red Rocks Community College are Metro Denver's only institutions with accredited entry-level physician assistant programs. (Colorado Health Institute, 2014)
- The College of Nursing at the University of Colorado was the birthplace of the first nurse practitioner program in the world. The College's Pediatric Nurse Practitioner specialty program ranked among the top five in the nation. (University of Colorado, 2014; *U.S. News & World Report*, 2014)
- The Organic Business Initiative at the University of Colorado Boulder's Deming Center for Entrepreneurship fosters entrepreneurial leaders, world-class scholarship, and research in natural and organic business. (The University of Colorado, 2014)
- The Colorado School of Public Health (CSPH) is the first accredited and only collaborative school of public health in the Rocky Mountain region. CSPH is home to three nationally funded research and training centers. (The Colorado School of Public Health, 2014)
- The University of Colorado ranked among the nation's top 25 institutions in total National Institutes of Health funding totaling \$162.8 million in fiscal year 2013. (National Institutes of Health, 2014)

4. A regional health hub, with expanding medical and wellness tourism opportunities

- HealthGrades named a number of nine-county region hospitals to their 2014 lists. Seven earned the 2014 Distinguished Hospital Award for Clinical Excellence, three ranked among "America's 100 Best Hospitals, four received awards for Women's Health Excellence, and four won awards for Outstanding Patient Experience. (HealthGrades, Inc., 2014)
- Twelve Metro Denver hospitals received "A" grades in hospital safety, 10 hospitals received a "B" grade, and three received a "C" grade. (The Leapfrog Group, 2014)
- Three Metro Denver hospitals were named to Truven Health Analytics "100 Top Hospitals" in 2014 including North Colorado Medical Center (Greeley), the University of Colorado Hospital (UCH) (Aurora), and Rose Medical Center (Denver). (Truven Health Analytics, 2014)

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- The Barbara Davis Center for Childhood Diabetes is one of the largest diabetes programs specializing in Type 1 diabetes research and care for children and adults in the world. (The Barbara Davis Center for Childhood Diabetes, 2014)
- Seven Metro Denver healthcare facilities have received Magnet status—the most prestigious recognition of nursing excellence. (American Nurses Credentialing Center, 2014)
- Children’s Hospital Colorado (CHC) ranked as the sixth-best children’s hospital in the nation with six of its specialty areas also in the top 10 in their respective categories. CHC was also named to the *U.S. News’ Honor Roll* and ranked fifth on *Parents* magazine’s “10 Best Children’s Hospitals in America” list. (*U.S. News & World Report*, 2014; *Parents*, 2014)
- Eleven Metro Denver hospitals were named to the 2014-2015 “Best Hospitals.” UCH ranked as the top facility in Metro Denver and ranked nationally in nine specialties. (*U.S. News & World Report*, 2014)
- HCA-HealthONE’s Rocky Mountain Hospital for Children (RMHC) houses the region’s largest neonatal intensive care unit and the largest high-risk obstetrical program. RMHC cares for infants, children, and teenagers across a six-state region. (Rocky Mountain Hospital for Children, 2014)

5. An overall better quality of life

- Castle Rock ranked fourth in *MONEY Magazine’s* 2014 list of the “Best Places to Live.” Centennial (13th) and Boulder (23rd) were also named to the list’s top 50. (*MONEY Magazine*, 2014)
- Boulder ranked second on the 2014 list of the “Top 100 Best Places to Live.” Aurora (50th) and Lakewood (88th) were also named to the list. (Livability.com, 2014)
- Aurora and Denver ranked among the top cities in the nation to retire. Aurora ranked 11th in healthcare and Denver ranked 11th in activities. (WalletHub, 2014)
- FasTracks, a comprehensive project to build out Metro Denver’s entire mass transit system by 2019, is the largest simultaneous transit buildout in U.S. history. The expansion will make Metro Denver one of the top five regions in the country in terms of miles of fixed rail.

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NAICS Code*	NAICS Description	SIC Code	SIC Description
315220 (P)	Men’s & boys’ cut & sew apparel mfg.	2329-01	Men’s & boys’ sportswear & athletic clothing
315240 (P)	Women’s, girls’, & infants’ cut & sew apparel mfg.	2339-03	Women’s & misses’ athletic clothing & sportswear
336991 (P)	Motorcycle, bicycle, & parts manufacturing	3751-02	Bicycles & related parts
339115 (P)	Ophthalmic goods mfg.	3851	Ophthalmic goods (except intraocular lenses)
339116	Dental laboratories	8072	Dental laboratories
339920	Sporting & athletic goods mfg.	3949	Sporting & athletic goods, NEC
423450	Medical, dental, & hospital equip. & supplies merchant wholesalers	5047	Medical, dental & hospital equip. & supplies (merchant wholesalers except those selling medical, dental, and hospital equipment and supplies via retail method)
423460	Ophthalmic goods merchant wholesalers	5048	Ophthalmic goods, NEC
423910 (P)	Sporting & recreational goods & supplies merchant wholesalers	5091	Sporting & recreation goods
424210 (P)	Drugs & druggists sundries merchant wholesalers	5122-0310	Vitamins & minerals
424340 (P)	Footwear merchant wholesalers	5139-9902	Footwear, athletic
424490 (P)	Other grocery & related products merchant wholesalers	5149-06	Organic & diet food
446191	Food (health) supplement stores	5499-01	Health & dietetic food stores
532291	Home health equipment rental	7352	Medical equipment rental
532292	Recreational goods rental	7999-9911	Recreation equipment rental
611620	Sports & recreation instruction	7999-11	Instruction schools, camps, & services
611710 (P)	Educational support services	8299-9910	Meditation therapy
621111	Offices of physicians (except mental health specialists)	8011	Offices & clinics of doctors of medicine
621111	Offices of physicians (except mental health specialists)	8031	Offices & clinics of doctors of osteopathy
621112	Offices of physicians, mental health specialists	8011	Offices & clinics of doctors of medicine
621112	Offices of physicians, mental health specialists	8031	Offices & clinics of doctors of osteopathy
621210	Offices of dentists	8021	Offices & clinics of dentists
621310	Offices of chiropractors	8041	Offices & clinics of chiropractors

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NAICS Code*	NAICS Description	SIC Code	SIC Description
621320	Offices of optometrists	8042	Offices & clinics of optometrists
621330	Offices of mental health practitioners (except physicians)	8049	Offices & clinics of health practitioners, NEC
621340	Offices of physical, occupational speech therapists, & audiologists	8049	Offices & clinics of health practitioners, NEC
621391	Offices of podiatrists	8043	Offices & clinics of podiatrists
621399	Offices of all other miscellaneous health practitioners	8049	Offices & clinics of health practitioners, NEC
621410	Family planning centers	8093	Specialty outpatient facilities, NEC
621410	Family planning centers	8099	Health & allied services, NEC
621420	Outpatient mental health & substance abuse centers	8093	Specialty outpatient facilities, NEC
621491	HMO medical centers	8011	Offices & clinics of doctors of medicine
621492	Kidney dialysis centers	8092	Kidney dialysis centers
621493	Freestanding ambulatory surgical & emergency centers	8011	Offices & clinics of doctors of medicine
621498	All other outpatient care centers	8093	Specialty outpatient facilities, NEC
621511	Medical laboratories	8071	Medical laboratories
621512	Diagnostic imaging centers	8071	Medical laboratories
621610	Home health care services	8082	Home health care services
621910 (P)	Ambulance Services	4119-9902	Ambulance service
621991	Blood & organ banks	8099	Health & allied services, NEC
621999	All other misc. ambulatory health care services	8099	Health & allied services, NEC
622110	General medical & surgical hospitals	8062	General medical & surgical hospitals
622110	General medical & surgical hospitals	8069	Specialty hospitals, except psychiatric
622210	Psychiatric & substance abuse hospitals	8063	Psychiatric hospitals
622210	Psychiatric & substance abuse hospitals	8069	Specialty hospitals, except psychiatric
622310	Specialty (except psychiatric & substance abuse) hospitals	8069	Specialty hospitals, except psychiatric
623110	Nursing care facilities (skilled nursing facilities)	8051	Skilled nursing care facilities
623110	Nursing care facilities (skilled nursing facilities)	8052	Intermediate care facilities
623110	Nursing care facilities (skilled nursing facilities)	8059	Nursing & personal care facilities, NEC
623210	Residential intellectual & developmental disability facilities	8052	Intermediate care facilities
623311	Continuing care retirement communities	8051	Skilled nursing care facilities
623311	Continuing care retirement communities	8052	Intermediate care facilities
623311	Continuing care retirement communities	8059	Nursing & personal care facilities, NEC
624190 (P)	Other individual & family services	8322-0400	Rehabilitation services
624190 (P)	Other individual & family services	8322-0500	Family counseling services
624190 (P)	Other individual & family services	8322-0501	Family (marriage counseling)
624190 (P)	Other individual & family services	8322-0600	General counseling services
624190 (P)	Other individual & family services	8322-0601	Community center
624190 (P)	Other individual & family services	8322-0602	Helping hand service (Big Brother, etc.)
624190 (P)	Other individual & family services	8322-0603	Multi-service center
624190 (P)	Other individual & family services	8322-0605	Outreach program
624190 (P)	Other individual & family services	8322-0608	Self-help organization, NEC
624190 (P)	Other individual & family services	8322-08	Substance abuse counseling
624210 (P)	Community food services	8322-9901	Meal delivery program
713940	Fitness & recreational sports centers	7991	Physical fitness facilities
713940	Fitness & recreational sports centers	7999-9910	Recreation center
713990 (P)	All other amusement & recreation industries	7999-9912	Recreation services
812191	Diet & weight reducing centers	7299-0102	Diet center, without medical staff
812199 (P)	Other personal care services	7299-0200	Massage parlor & steam bath services
812199 (P)	Other personal care services	7299-0201	Massage parlor
813212	Voluntary health organizations	8399-9906	Health systems agency
813319 (P)	Other social advocacy organizations	8399-9905	Health & welfare council
923120	Administration of public health programs	9431	Administration of public health programs

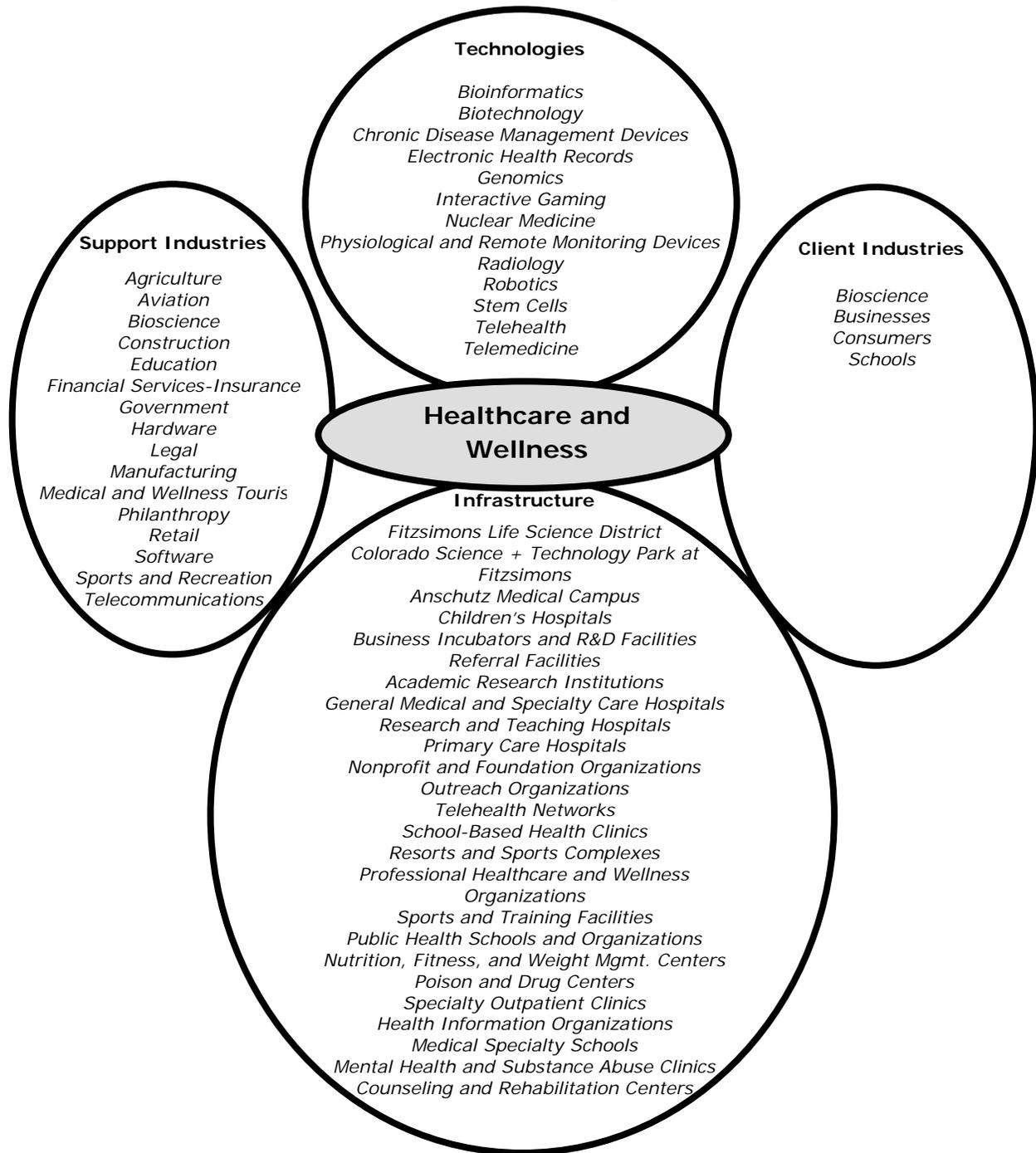
*(P) indicates that only part of the NAICS industry category is represented in the industry cluster definition.

Note: NEC indicates "not elsewhere classified."

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Healthcare and Wellness Industry Cluster Relationships



For additional information, contact us:



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