

Industry Overview

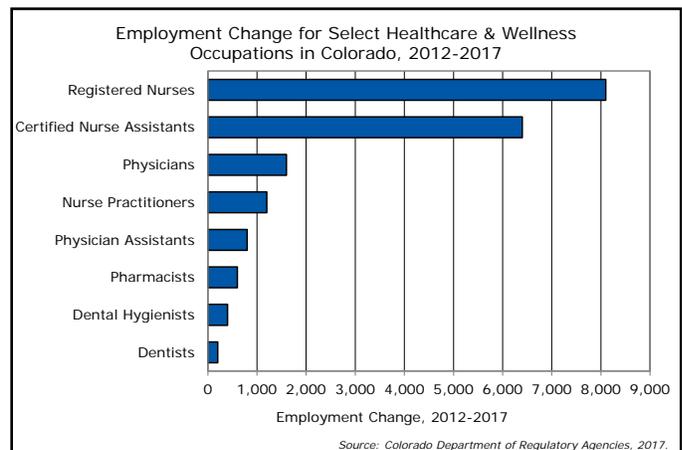
The nine-county Metro Denver and Northern Colorado region's¹ dynamic outdoor environment and emphasis on health combine to make it one of the healthiest regions in the United States. According to the American College of Sports Medicine, Metro Denver ranked as the nation's seventh-fittest metropolitan area in 2017 and Boulder ranked among the top 10 metro areas for residents' overall health and well-being. With one of the highest rates of physical activity in the nation, and a low prevalence of diabetes and heart disease, the Metro Denver region's healthy population translates into a productive workforce. The nine-county region is part of a larger healthcare and wellness community in



Colorado. The state's obesity rate (22.3 percent) was the lowest in the nation in 2017 and Colorado has consistently had the lowest obesity rate of any state since 1990, as access to recreational and fitness opportunities abound. The state offers a diverse selection of outdoor recreational activities that draw visitors from every corner of the world. In fact, Colorado has one of the nation's largest public parks systems, over 45 national and state parks, 11 world-class ski resorts, and the highest concentration of 13,000 and 14,000-foot peaks in the nation.

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 healthcare and wellness workforce continues to drive the region's employment growth. Employment has increased every year since 2004, adding over 88,420 workers between 2004 and 2017. Over the past five years, employment in the region grew 24.1 percent, which was nearly double the U.S. growth rate of 10.7 percent. Between 2012 and 2017, the region added 43,250 healthcare and wellness jobs, accounting for 10 percent of the total job growth in the region over this period of time. With an employment base of over 222,700 workers in 21,160 companies, the healthcare and wellness cluster is the region's largest cluster in terms of employment.

Between 2012 and 2017, Colorado gained approximately 1,600 physicians, bringing the total number of active licensed physicians to nearly 15,700, according to the Colorado Department of Regulatory Agencies. Of the healthcare workforce, registered nurses (RN) represent the largest subcategory with more than 60,000 RNs licensed to work across the state. Since 2012, RNs have increased 15 percent and are expected to grow another 40 percent by 2025. The number of Certified Nurse Assistants increased rapidly following the implementation of the Affordable Care Act but has since stabilized. This group is particularly important since it provides about 80 percent of the hands-on services needed by Colorado's senior population. Other healthcare and wellness occupations have grown by at least 200 practitioners over the last five years, including dentists and dental hygienists.



¹ The nine-county region is comprised of two principal areas, Metro Denver and Northern Colorado. Metro Denver consists of Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, and Jefferson counties. Northern Colorado consists of Larimer and Weld counties.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

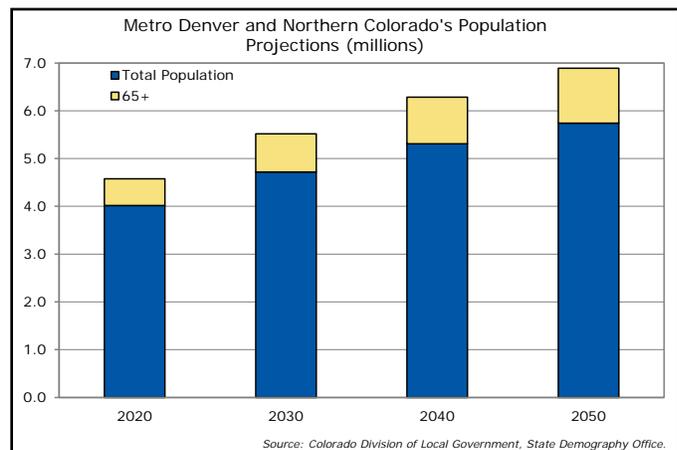
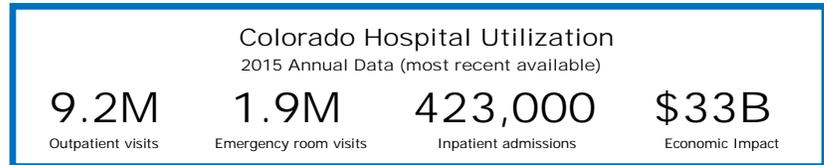
The region is home to major healthcare systems and hospitals ensuring the health and wellness of area residents. According to the most recent data from the Colorado Hospital Association, hospitals experienced more than 9.2 million outpatient visits, 1.9 million

visits to emergency departments, had 423,000 inpatient admissions, and delivered 63,000 babies in 2015. For every dollar spent at a Colorado hospital, two dollars were generated for the broader Colorado economy, creating \$33 billion in total economic activity. Despite increased utilization and spending, the state has controlled its cost curve. Colorado ranked fifth-lowest among all states in per capita healthcare spending and had the fourth lowest average annual health spending growth rate across an 11-year period. According to Altarum Institute, hospital spending grew only 0.8 percent between June 2016 and June 2017, the lowest annual growth rate since Altarum began tracking hospital spending in 1989. Also, Colorado has historically ranked well for both transparency and affordability.

Demand for healthcare and wellness services is expected to increase due to a growing and aging population, a higher prevalence of chronic conditions such as heart disease and diabetes, and changes in residents' behavior and lifestyle choices. As of 2017, the nine-county region's projected population is about 3.8 million people, of which about 13 percent are 65 or older. According to the Colorado State Demography Office, the overall population growth rate was 14 percent between 2010 and 2017, while the senior population grew by 43 percent. As these seniors age out of the workforce over the next 20 years, the healthcare system infrastructure will need to shift.

Colorado and the nine-county region are leaders in the natural and organic products industry. According to the 2017 U.S. Department of Agriculture's Certified Organic Survey, the state's organic agricultural industry has more than doubled in sales, growing from \$66.2 million in 2012 to \$155.2 million in 2015. The state ranked among the top 10 in certified organic sales, totaling \$181 million in 2016, and ranked among the top five states in certified organic wheat and millet acreage. Organic farmland covers more than 155,000 acres statewide, with another 70,000 acres dedicated to organic pastureland and rangeland. Further, several nationally-known organic foods companies, including Boulder Brands, Fresca Foods, and Justin's Nut Butter, got their start in Colorado.

Breakthrough technologies, innovative software, and integrated design-based solutions are driving fundamental changes in the delivery of healthcare and wellness, and care. The shift toward participatory health including wearables and monitoring devices, cognitive technologies such as machine learning on mobile devices, and sensors are central to the shift in the new model of care. Several companies across the nine-county region are leaders in the intersection of technology and healthcare. For example, Westminster-based C3LX's mobile app encourages patients to choose healthy behaviors to prevent disease and illness. Denver-based Welltok's CaféWell Health Optimization Platform™ organizes the growing spectrum of health and condition management programs, communities, apps, and tracking devices. Companies such as Boulder-based Stryd and Boulder-based TrainingPeaks provide fitness monitoring devices to track workout efficiency, power, and speed. Additionally, several of the region's hospitals including Longmont United Hospital and Boulder Community Health are ramping up their remote patient monitoring programs. Longmont United Hospital offers its LifeWatch to monitor patients with heart arrhythmia and more than 1,200 cardiovascular patients are part of the remote monitoring program at Boulder Community Health's Boulder Heart program. Further, electronic health records and telemedicine have greatly improved the way patient care is delivered and compensated.



HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

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. The cluster also 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 living, and long-term care and businesses that provide services for individuals, families, and the elderly are also included.

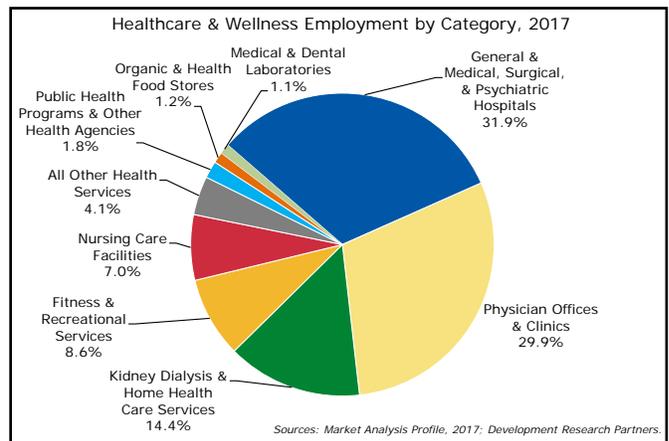
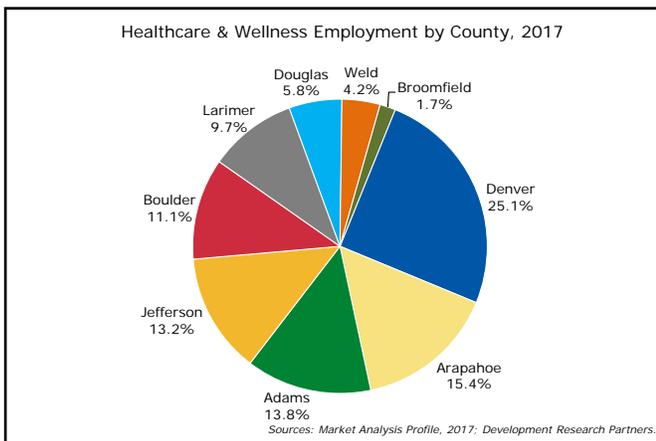
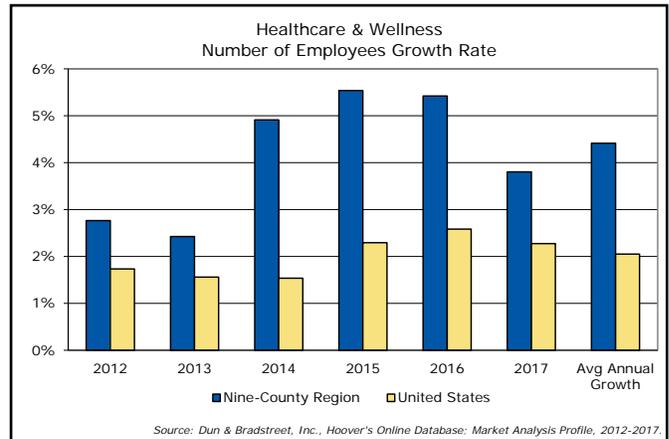
The cluster encompasses home health and recreation equipment rental, fitness and recreation facilities, diet and weight reducing services, and massage and yoga services. Companies that manufacture ophthalmic goods, sports and athletic equipment, and outerwear, and retailers engaged in vitamins and nutrition supplements are also a part of healthcare and wellness. 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.

Nine-County Rankings²

Healthcare & wellness direct employment rank	14th
Healthcare & wellness direct employment concentration rank	34th

	Nine-County Region	United States
Direct employment, 2017	222,700	18,102,590
Number of direct companies, 2017	21,160	1,407,470
One-year direct employment growth, 2016-2017	3.8%	2.3%
Five-year direct employment growth, 2012-2017	24.1%	10.7%
Avg. annual direct employment growth, 2012-2017	4.4%	2.0%
Direct employment concentration	9.6%	10.5%

Sources: Dun & Bradstreet, Inc., Hoover's Online Database; Market Analysis Profile, 2012-2017; Development Research Partners.



² Direct employment rank based on the number of employees in the industry cluster in a region. Employment concentration rank based on the direct cluster employment in a region expressed as a percent of total employment in all industries in the same region. Rankings are for the 50 largest metropolitan statistical areas (MSAs). No multiplier effects are included. 1st = highest for both rankings.



HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Major Healthcare & Wellness Companies (excludes major health systems, highlighted below)

- BAYADA Home Health
www.bayada.com
- CorePower Yoga
www.corepoweryoga.com
- DaVita Inc.
www.davita.com
- Envision Healthcare
www.evhc.net
- HSS Inc.
www.hss-us.com
- InnovAge
www.myinnovage.org
- Life Care Centers of America
www.lcca.com
- Personal Assistance Services of Colorado (PASCO)
www.pascohh.com
- United Natural Foods
www.unfi.com
- Wellbridge, Inc.
www.wellbridge.com

Major Healthcare and Wellness Foundations and Organizations



Nine-County Region Major Health Systems and Facilities

The nine-county region is home to major health systems and facilities that provide quality care to its residents. The region's major health systems and facilities are highlighted below, along with their corresponding projects and developments that were announced in 2017.

Anschutz Medical Campus and Fitzsimons Innovation Campus

The 578-acre Fitzsimons campus includes the [Anschutz Medical Campus](#) and the [Fitzsimons Innovation Campus](#). As one of the most ambitious medical developments in the nation, the \$5.2 billion project encompasses more than six million square feet of cutting-edge space and services that will eventually support more than 43,000 bioscience and healthcare professionals.

- A \$38 million gift to the University of Colorado Anschutz Medical Campus and a new \$9.8 million partnership will provide mental health care for military veterans and their families. The Marcus Foundation has committed a five-year gift to establish the Marcus Institute for Brain Health. Additionally, the Cohen Veterans Network will work with the Anschutz Medical Campus to build a mental health clinic to serve veteran and military families in Metro Denver with free, or low-cost, personalized care and integrated case management support.
- Researchers from the University of Colorado Anschutz Medical Campus and the University of Colorado Boulder won a prestigious \$2 million grant to refine a microscope they developed to study the brain. The fiber-coupled, two photon miniature microscope will be expanded for other scientists to use across the nation.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Banner Health

Banner Health is a premier health system in Northern Colorado, providing services to the cities of Berthoud, Eaton, Fort Collins, Greeley, Johnstown, Loveland, and Windsor. Two major health centers—the North Colorado Medical Center (NCMC) and the McKee Medical Center—have served the region for a combined 130 years. NCMC in Greeley is rated nationally among the top 1 percent of hospitals for clinical quality. The McKee Medical Center is an acute-care hospital serving the Loveland community. www.bannerhealth.com

Rankings & Notable Designations

- McKee Medical Center and NCMC received “A” grades in hospital safety from The LeapfrogfHC Group.
- Surgical Review Corp. named the McKee Medical Center the first and only Center of Excellence in Robotic Surgery in Colorado.
- For the third year in a row, NCMC was named among “America’s 50 Best Hospitals” in 2017, according to Healthgrades.
- The American Association of Cardiovascular and Pulmonary Rehabilitation certified NCMC and McKee Medical Center, recognizing both for their commitment to improving quality of life by enhancing standards of care.

News

- Banner Health Center opened its expanded Harmony Road campus, doubling its size and expanding its pediatric, OB-GYN, and family medicine services.
- Banner Fort Collins Medical Center opened the Banner Health Structural Heart & Valve Clinic and expanded its delivery department.

Boulder Community Health

Boulder Community Health (BCH) is a community owned-and-operated health system dedicated to providing local access to high quality medical care to people and businesses in Boulder County and the City and County of Broomfield. BCH provides clinical excellence in heart care, neurosurgery, stroke care, orthopedics, and cancer care. www.bch.org

News

- BCH will open a medical office building and urgent-care facility in Erie at the end of 2018. The 40,000-square-foot facility will be Erie’s first large-scale medical site.
- Construction at BCH’s 40-bed facility in Lafayette is expected to be completed in early 2019. The 58,000-square-foot rehabilitation hospital will include a gym and outdoor courtyard for therapeutic uses.
- BCH’s hospitals in Lafayette and Boulder will participate in a six-month pilot program to study the effectiveness of alternative pain treatments, aimed at reducing the use of opioids in emergency rooms. BCH will gather data, establish best practices, and determine the efficacy of the alternative treatments in managing acute pain.

Centura Health

Centura Health connects Coloradans to affordable, world-class care through an integrated network of healthcare staff and physician partners. A part of the Catholic Health Initiatives Network, facilities in the nine-county region include Avista Adventist, Castle Rock Adventist, Littleton Adventist, Longmont United Hospital (LUH), OrthoColorado Hospital, Parker Adventist, Porter Adventist, St. Anthony, St. Anthony North Health Campus, and numerous urgent care, neighborhood health centers, surgery centers, and diagnostic imaging centers, among others. www.centura.org

Rankings & Notable Designations

- Porter Adventist and Parker Adventist were ranked among the top five best hospitals in Metro Denver, according to *U.S. News & World Report*. Porter Adventist’s specialties in ear, nose, and throat and orthopedics were ranked nationally.
- Porter Adventist was ranked among Becker Hospital Review’s “100 Great Hospitals in America.”
- Porter Adventist received an “A” grade in hospital safety, according to The Leapfrog Group.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

- Centura Health's data center, core infrastructure, and electronic health center in Centennial earned Certified Status for information security by the Health Information Trust Alliance for the third time.

News

- The newly renamed and revamped Centura Health Integrative Medicine added a new community acupuncture clinic and community wellness training center in Longmont.
- Arapahoe County-based Catholic Health Initiatives (CHI) and Dignity Health signed a merger agreement to form one of the largest faith-based health systems in the nation. The two systems will span across 28 states and will employ more than 162,000 people.

Children's Hospital Colorado

Children's Hospital Colorado (CHC), whose main facility is located on the Anschutz Medical Campus, is the region's premier hospital for children. CHC provides care to more children than any hospital in the surrounding states through its network of over 3,000 pediatric specialists. CHC is home to the only Level I pediatric trauma center in a seven-state region. CHC has over 10 satellite locations throughout the region.

www.childrenscolorado.org

Rankings & Notable Designations

- *U.S. News & World Report* ranked CHC among the top 10 children's hospitals in the nation with five of its specialty areas among the top 10 in their respective categories.
- Becker Hospital Review named CHC among the "100 Great Hospitals in America."
- *Hospitals & Health Networks* magazine named CHC the nation's most wired hospital.

News

- Launched in 2017, the Pediatric Care Network, a collaboration among community pediatric providers, specialists at the University of Colorado School of Medicine, and CHC, aims to enhance the health and well-being of children by delivering higher quality and more efficient care at a lower cost. The Pediatric Care Network is the largest clinically-integrated network in the state of Colorado that is dedicated exclusively to kids.
- Englewood-based Flight For Life Colorado and CHC launched a new critical care helicopter to transport and care for small children. Supplied by Englewood-based Air Methods Corp., the Airbus H130 T2 helicopter will transport patients within a 120-mile radius to all of CHC's facilities in the region.
- CHC and RxRevu collaborated to help prescribers better meet the needs of children by seamlessly incorporating antimicrobial-stewardship best practices into prescribers' decision-making processes. The expected result of this effort is more judicious prescribing of antimicrobials and other medications, enhanced clinical consistency, and improved workflow.

Craig Hospital

Craig Hospital in Denver is a world-renowned center for specialty rehabilitation and research for people with spinal cord injury (SCI) and traumatic brain injuries (TBI). Craig is a national center of excellence and has treated over 31,000 patients with SCI—more than any other single center in the world—and TBI since 1956.

www.craighospital.org

Rankings & Notable Designations

- *U.S. News & World Report* named Craig Hospital the seventh-best rehabilitation hospital in the nation and 2017 was the 28th-consecutive year that Craig was ranked among the top 10.

News

- Craig Hospital was awarded a \$2.5 million research grant from the National Institute on Disability, Independent Living and Rehabilitation Research. The project, in collaboration with the University of Michigan and Kessler Institute for Rehabilitation, will study the effect of group therapy intervention developed at Craig on people living with SCI.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Denver Health

As a comprehensive, integrated organization providing level one care for all, Denver Health is Colorado's primary safety net institution. Denver Health is one of four Level I trauma centers in Colorado and one of the primary teaching hospitals in Denver. Since becoming Denver Health and Hospital Authority in 1997, the number of individuals cared for at Denver Health annually has increased from 120,000 to 220,000 and the 911 ambulance transports increased from 54,000 to 112,000. As Colorado's primary safety net institution, Denver Health has provided \$5.5 billion in uncompensated care. Twenty-five percent of all Denver residents, or approximately 150,000 individuals, receive their healthcare at Denver Health. www.denverhealth.org

Rankings & Notable Designations

- Healthgrades awarded Denver Health a 2017 Distinguished Hospital Award for Clinical Excellence, placing it among the top five percent of hospitals in the nation.
- The American Hospital Association's Health Forum recognized Denver Health as a most wired healthcare system.

HCA-HealthONE

HCA-HealthONE® is one of the region's largest healthcare systems with more than 10,000 employees. Major facilities in the region including The Medical Center of Aurora, North Suburban Medical Center, Presbyterian/St. Luke's Medical Center, Rocky Mountain Hospital for Children, Rose Medical Center, Sky Ridge Medical Center, Swedish Medical Center, and Spalding Rehabilitation Hospital work together to provide a higher level of care. Other services include seven free-standing emergency departments, numerous ambulatory surgery centers, CareNow Urgent Care Clinics and Occupational Medicine, physician practices, and AIRLIFE-DENVER, which provides critical care air and ground transportation across a 10-state region. www.healthonecares.com

Rankings & Notable Designations

- Rose Medical Center, the Medical Center of Aurora, Sky Ridge Medical Center, and Presbyterian/St. Luke's Medical Center were named among the nation's "Best Hospitals," according to *U.S. News & World Report*. Rose was also named as a Best Hospital (#40) in national rankings for gynecological care, and achieved the highest rating possible in five procedures or conditions.
- Six Metro Denver HealthONE medical centers received "A" grades in hospital safety from The Leapfrog Group.
- Rose Medical Center earned The Centers for Medicare & Medicaid Services' Hospital Compare's five-star rating and was named a Five-Star Recipient for hysterectomy care by Healthgrades.
- Truven Health Analytics named Rose Medical Center among the nation's "Top 100 Hospitals."
- Swedish Medical Center was named a 2017 Gynecologic Surgery Excellence Award recipient by Healthgrades.
- The Medical Center of Aurora and Rose Medical Center received the American Heart Association/American Stroke Association's Get With The Guidelines®-Stroke Gold Plus Quality Achievement Award. Rose Medical Center also received the Target: StrokeSM Honor Roll Elite honor.
- Rose Medical Center was designated an Aetna Institute of Quality® Orthopedic Care Facility for total joint replacement and spine surgery.
- Rose Medical Center achieved the Healthgrades 2017 Outstanding Patient Experience Award for the third year in a row.
- The American Association of Critical-Care Nurses conferred a silver-level Beacon Award for Excellence on the Intensive Care Unit at Rose Medical Center.

News

- Swedish Medical Center renovated its 10,905-square-foot Sarah Cannon Cancer Institute. The renovation includes 13 remodeled patient rooms, caring for more than 3,500 patients per year.
- Renovations are underway at Swedish Medical Center's main campus emergency room, which is slated for completion in February 2018. The renovations include a new waiting room and a new entrance.
- The fifth Metro Denver CareNow Urgent Care clinic opened in Stapleton in October 2017. The clinic has x-rays and a laboratory on-site, and provides occupational medicine services to local employers such as drug tests and pre-employment screenings.
- HealthONE expanded its Graduate Medical Education program to include residencies in psychiatry and neurology. While both new programs will conduct their preliminary training at Sky Ridge, the new

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

psychiatry program will be focused at The Medical Center of Aurora and utilize the expertise of its adult, geriatric, and adolescent behavioral health unit. The neurosciences program will be housed at Swedish Medical Center, known as one of the nation's top neuroscience programs, and a designated Neuroscience Center of Excellence through the Neuroscience Center of Excellence Survey.

- Swedish Medical Center was the first hospital in the nation to implant the U.S. Food and Drug Administration's approved LivaNova Vagus Nerve Stimulation Therapy ("VNS Therapy") System. The implantable generator and the next-generation VNS Therapy Programming System is used for the treatment of patients with drug-resistant epilepsy.
- Sky Ridge Medical Center acquired the first Mazor X™ system in Colorado and a 10-state region for spine surgery. Sky Ridge surgeons are performing spine surgeries with the Mazor X™ system, which increases the efficiency and safety of spine surgery.

Kaiser Permanente Colorado

Kaiser Permanente Colorado is the state's largest nonprofit health plan, serving over 670,000 members throughout much of Colorado for more than 40 years. Approximately 1,600 Kaiser Permanente Colorado physicians provide care in over 25 medical offices across the nine-county region. Several Kaiser-affiliated hospitals and offices provide care to patients including Children's Hospital Colorado Main Campus, Children's Hospital at Parker Adventist Hospital, Children's Hospital at Saint Joseph Hospital, Good Samaritan Medical Center, HealthONE Rocky Mountain Hospital for Children, HealthONE Sky Ridge Medical Center, HealthONE Swedish Medical Center, and Saint Joseph Hospital, among others. www.kaiserpermanente.org

Rankings & Notable Designations

- The Centers for Medicare & Medicaid Services rated Kaiser Permanente Colorado's Medicare Senior Advantage plan 5 out of 5 stars—the highest overall rating for quality and service—for 2018.
- J.D. Power 2017 Member Health Plan Study named Kaiser Permanente Colorado the highest ranked health plan in member satisfaction in the state for the 10th consecutive year.

National Jewish Health

National Jewish Health is a worldwide leader in treating patients with respiratory, cardiac, immune, and related disorders. Founded in 1899 as a nonprofit hospital, National Jewish Health remains the only facility in the world dedicated exclusively to these disorders. Patients and families come to National Jewish Health from around the world to receive cutting-edge, comprehensive, coordinated care. www.nationaljewish.org

Rankings & Notable Designations

- National Jewish Health was named the top respiratory hospital in the nation by *U.S. News & World Report* in its 2017 Best Hospitals rankings. The Hospital was also recognized as "High Performing," the best rating available, for care of patients with chronic obstructive pulmonary disease and for lung cancer surgery in the Common Adult Conditions and Procedures categories.

The Rocky Mountain Regional Veterans Affairs (VA)

Located adjacent to the Anschutz Medical Campus is the Rocky Mountain Regional VA Medical Center. The 1.2 million-square-foot facility replaces the original hospital, built more than 60 years ago. The new facility is on-track for a 2018 completion and will feature 306,000 square feet of diagnostic and treatment space, 260,000 square feet of inpatient space, and 302,000 square feet of clinic space across three outpatient and two inpatient clinic buildings. The VA will also include over 180 inpatient beds in acute care, critical care, mental health, and rehabilitation, as well as a 30-bed spinal cord injury clinic. At buildout, the VA Hospital is expected to employ about 2,000 people and serve thousands of veterans annually. www.denver.va.gov

SCL Health

SCL Health is a faith-based, nonprofit healthcare organization which is headquartered in Broomfield. SCL Health provides care through four major hospitals, four community hospitals, ambulatory service centers, home healthcare, hospice, mental healthcare, and safety-net services. Major healthcare facilities in the region include Good Samaritan Medical Center, Lutheran Medical Center, Platte Valley Medical Center, Saint Joseph

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Hospital, and SCL Health Community Hospitals in Northglenn, Littleton, Aurora, and Westminster.

www.sclhealth.org

Rankings & Notable Designations

- Lutheran Medical Center was named among the nation's "Best Hospitals," according to *U.S. News & World Report*.
- Saint Joseph Hospital received Magnet® designation, the highest credential for nursing excellence.
- Lutheran Medical Center and Saint Joseph Hospital received "A" grades in hospital safety, according to The Leapfrog Group.

News

- SCL opened a new 37,000-square-foot satellite emergency center in Aurora.
- SCL Health Community Hospital in Northglenn opened, which features an emergency department with surgical capabilities, an eight-bed inpatient unit, an advanced imaging center, and laboratory services. The 60,000-square-foot hospital will also include specialty services for heart, gastroenterology, and foot and ankle.

University of Colorado Health

University of Colorado Health (UCHealth) provides evidence-based healthcare and wellness services in Colorado, Nebraska, and Wyoming, and includes the University of Colorado Hospital (UCH), Poudre Valley Hospital (PVH), Medical Center of the Rockies, Broomfield Hospital, Highlands Ranch Hospital, Longs Peak Hospital, Greeley Emergency and Surgery Center, and other clinics and outpatient services. www.uchealth.org

Rankings & Notable Designations

- UCH, the Medical Center of the Rockies, and PVH were named among the "Best Hospitals," according to *U.S. News & World Report*. UCH ranked as the top facility in Metro Denver.
- Vizient named UCH as the seventh-highest performing academic hospital in the U.S. for delivering quality health care.
- Becker's Hospital Review named PVH and UCH as two of the "100 Great Hospitals in America" and named PVH among the top "100 Hospitals with Great Orthopedic Programs."
- Truven Health Analytics named the Medical Center of the Rockies, PVH, and UCH among the nation's "Top 100 Hospitals."
- PVH received an "A" grade in hospital safety, according to The Leapfrog Group.
- UCHealth's Longs Peak Hospital was awarded accreditation from The Joint Commission, the largest standards-setting and accreditation organization in the U.S. The accreditation qualifies the hospital to participate in the Medicare, Medicaid, and Tricare programs and is a key milestone to finalize coverage agreements with other insurance providers.

News

- The new \$125 million, 210,000-square-foot Longs Peak Hospital opened in Longmont. The hospital includes a Level III trauma center, four operating rooms, a birth center, a level II special-care nursery, and an intensive-care unit. UCHealth plans to employ 350 people and work with 370 healthcare providers.
- PVH opened its expanded 64-bed emergency department, orthopedics unit, and laboratory. The hospital's three-story, 185,000-square-foot expansion includes a retail pharmacy, a rooftop helipad, and a patient and visitor parking lot.
- UCHealth broke ground on its \$185 million Greeley Campus that will include a hospital and medical center. The \$135 million, 153,000-square-foot UCHealth Greeley Hospital will provide 53 beds, an intensive care unit, and an emergency department, among other facilities. The \$50 million, 112,000-square-foot UCHealth Medical Center will have 192 exam rooms and outpatient services. Once completed in 2018, the Campus will create 300 healthcare jobs.
- A new urgent care clinic opened in Thornton to expand accessibility to more affordable emergency services. The clinic will employ nurse physicians, physician assistants, and nurse practitioners in order to supply basic treatments including laboratory and X-ray services.
- A comprehensive healthcare facility will open in Cherry Creek in late 2018. The 89,000-square-foot facility will offer primary care, women's care, cancer care and imaging, and ambulatory surgery.

Key Company Announcements

Healthcare

- **Front Range Orthopedics & Spine Center** opened its new 32,000-square-foot, two-story orthopedic and spine center in Longmont. The center provides access to 10 surgeons that specialize in orthopedics and spine procedures, an outpatient surgery center and physical therapy center, and digital x-ray and high-resolution MRI services.
- **MedExpress Urgent Care** plans to open clinics in Longmont, Fort Collins, and Glendale, providing walk-in treatment for illnesses and injuries, wellness exams, and employer health services. The company is also planning to open an urgent care clinic in Fort Collins.
- Vertex Builders broke ground on a four-story medical office building at South Havana Street and East Dry Creek Road. The **Dry Creek Medical Office** will include 53,000 square feet of tenant space, with a 10,000-square-foot, lower-level parking garage on a four-acre site. Construction is slated for completion by year-end 2018.
- Construction began on the four-story, 60,000-square-foot **Superior Medical Center**. The \$18.5 million project is slated for completion in early 2018, with tenants including Boulder Community Health and Cornerstone Orthopedics and Touchstone Imaging.

Senior Care

- Denver-based **MGL Partners** began construction of a \$52 million senior living facility near the Belleview Station area in the Denver Tech Center. The six-story Carillon at Belleview Station will include 163 independent living, assisted living, and memory care suites, which is slated for completion in May 2018.
- **Balfour Senior Living** opened two assisted living facilities in Stapleton and Littleton. The Stapleton facility includes 58 general assisted living apartments and 16 memory care units, while the Littleton facility includes 82 units.
- **MorningStar** at RidgeGate opened in early 2017 in Lone Tree. The 4.8-acre property includes independent living, assisted living, and memory care.
- **Columbine Health Systems** will construct a 45-bed skilled nursing facility for short-term rehabilitation, long-term care, and hospice at its campus in Windsor. Construction is expected to be completed by May 2018.
- **StoneGate Senior Living** opened its first Colorado facility in Golden. The 60,000-square-foot facility will serve as both an inpatient transitional care center and outpatient center for up to 80 patients, and will include physical, occupational, and speech rehabilitation services.

Organic Food

- Organic foods company **Tierra Farm Inc.** opened a 10,000-square-foot distribution center in Aurora and will add a number of employees. The New York-based organic foods company distributes to smaller grocery stores such as Alfalfa's Market in Boulder and Crunchy Grocer in Loveland.
- Organic palm oil company **Natural Habitats USA, Inc.** moved its headquarters to Boulder from Richmond, Calif. The company cited Boulder's history with natural products as motivation for its relocation, which it expects will benefit the company's future growth.

Recreation & Fitness

- Denver will be the host city for the **Outdoor Retailer** show, the largest show in North America for outdoor retailers, starting in 2018. The Outdoor Retailer show will be combined with the SnowSports Industries American Snow Show and will have an estimated \$110 million annual economic impact and attract an estimated 85,000 visitors per year.
- According to the **Outdoor Industry Association**, outdoor recreation in Colorado accounted for \$28 billion and brought \$2 billion in state and local taxes. Outdoor recreation directly created 229,000 jobs and nearly \$10 billion in wages.
- **Life Time Fitness** will open a \$10 million fitness center in the former Lakeshore Athletic Club in Broomfield in January 2018. The 175,000-square-foot facility will include an indoor and outdoor aquatic center; basketball courts; strength-training spaces; and group exercise, cycle, yoga, and Pilates studios.
- Construction began on the new 20-acre **Aurora Central Recreation Center**, which is slated to open by the end of 2018. The two-story, 60,000-square-foot center will feature an aquatics area, gymnasium, elevated walking/jogging track, and a fitness area.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

- The \$225 million, 65-field **Rocky Mountain Sports Park** broke ground in Windsor. The facility will be the largest sports park in the nation and will feature a 10,000-seat stadium, five baseball fields, 10 youth fields, 32 tournament baseball and softball fields, four T-ball fields, and 12 multi-use fields. The project is slated for completion in 2019.
- Construction began for the \$5.8 million, 44,000-square-foot **Parker Tennis Center**. The facility will include a welcome center, offices, locker rooms, lounge, and retail shop.
- Climbing and fitness company **Earth Treks** will convert the former Sports Authority headquarters in Englewood into the nation's largest rock climbing gym. The 52,000-square-foot climbing and fitness facility will hire 60 to 80 workers and is slated to open in 2018.
- **Gravity One**, a \$6 million, 20,000 square-foot climbing gym will be opening in Broomfield in 2018. The facility will be built on a two-acre parcel at 8701 Uptown Ave.

Major Collaborations and Partnership Activity

- **Centura Health** and **CHC** formed a care alliance to improve pediatric care across the state. Under the partnership, Centura's 17 hospitals will work with CHC to share clinical guidelines and protocols, and CHC will offer educational programs for physicians and nurses.
- **BCH** formed an alliance with **CHC** to provide inpatient care for children under 15 years old, in response to a decline in the number of pediatric inpatients treated at BCH's Foothills Hospital. Through the alliance, most pediatric care will be provided by BCH providers and local physicians will receive additional support from CHC, including a streamlined process for consulting with CHC specialists.
- Centura Health and **Banner Network Colorado** will enter into a provider network agreement in early 2018. Under the agreement, Banner's nearly 300 primary care providers and specialists, and three Banner Health hospitals in northern Colorado will join Colorado Health Neighborhoods, an entity comprised of more than 1,400 primary care providers and more than 2,800 specialists who coordinate care for more than 220,000 people in value-based agreements.

Cross-Cluster Convergence

Born from the collaboration between healthcare and software innovations, the region is a recognized national leader in the digital health arena. According to StartUp Health, Denver ranked among the top 10 U.S. cities for digital health funding, with five deals totaling \$192 million in 2017. Prime Health, StartUp Health Colorado, and Catalyst HTI are examples of partnerships to grow the region's digital health presence.

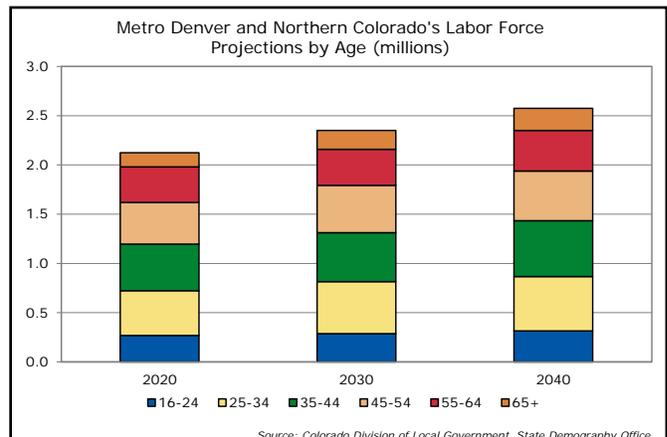
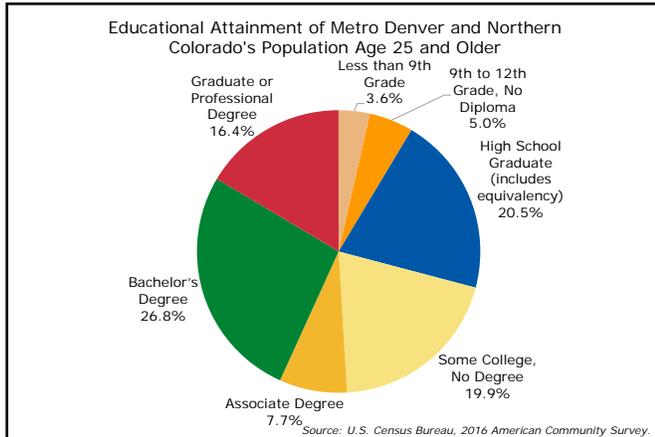
- Founded in July 2012 by the Denver South Economic Development Partnership and Innovation Pavilion, **Prime Health** is a growing statewide community of 1,600+ health care executives, physicians, technologists, academics, entrepreneurs, and investors dedicated to improving health and lowering healthcare costs through the commercialization of digital health technologies. Colorado is home to more than 130 digital health companies.
- Denver-based **CirrusMD**, which builds technology to offer secure mobile messaging between doctors and patients, will nearly double their workforce from 24 to 40 after raising \$7 million in venture capital. The company also plans to expand its sales and marketing staff, invest in customer support, and integrate more data analytics.
- **StartUp Health Colorado** launched to create a health innovation hub in the Rocky Mountain region. The organization partnered with Children's Hospital Colorado, UHealth, and the University of Colorado to streamline the pathways for health entrepreneurs to innovate and grow.
- **Catalyst HTI** is a health-tech industry integration project slated to open in 2018 in Denver's River North neighborhood that will integrate building space for startups, *Fortune* 500 companies, and healthcare providers in one location. The first-of-its-kind project will enable startups with resources to grow and expose providers and larger companies to emerging technologies and human capital.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Nine-County Region Workforce

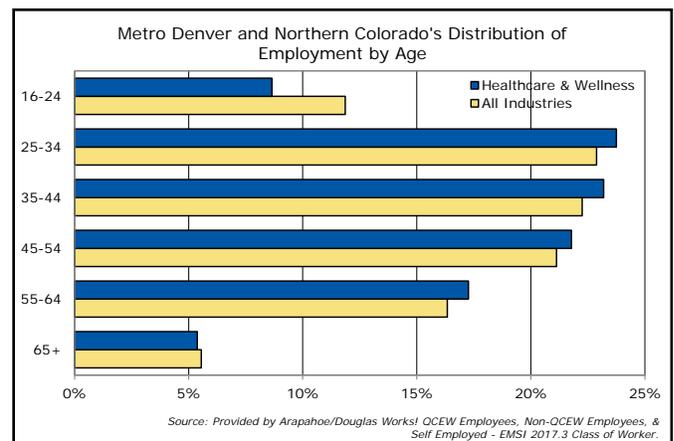
- Nearly half of the nine-county region's 3.8 million residents are under the age of 35. Employers can draw from a large, young, highly educated, and productive workforce.
- Of the region's adult population, 43.2 percent are college graduates and 91.4 percent have graduated from high school.
- The region's population is expected to grow 32.2 percent from 2020 to 2040, driving a 21.2 percent increase in the region's labor force over the same period.



Healthcare and Wellness Workforce Profile

Compared with the age distribution across all industries in the region, the healthcare and wellness cluster has a larger share of employees in all age categories except the 16 to 24 years old and 65 years and older categories.

The 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

- 2016 average annual salary was \$57,070, compared with the national average of \$57,600.
- Total payroll exceeded \$12.2 billion in 2016.

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

Metro Denver and Northern Colorado Healthcare and Wellness Occupation & Salary Profile, 2017

10 Largest Healthcare and Wellness Occupations in Metro Denver and Northern Colorado	Total Working Across All Industries (2017)	Number of Available Applicants (2017)	Number of Graduates (2016)	Median Salary	10th Percentile Salary	25th Percentile Salary	75th Percentile Salary	90th Percentile Salary
1. Registered nurses	35,520	864	2,225	\$70,318	\$52,777	\$59,217	\$71,755	\$82,258
2. Personal care aides	23,103	562	20	\$22,282	\$18,341	\$20,100	\$23,877	\$25,710
3. Nursing assistants	13,540	329	1,608	\$30,751	\$24,833	\$27,084	\$31,359	\$35,699
4. Home health aides	12,529	305	78	\$24,926	\$19,385	\$21,550	\$27,507	\$30,918
5. Business operations specialists, all other	32,514	791	17	\$74,757	\$43,128	\$55,758	\$98,542	\$126,087
6. Receptionists & information clerks	14,905	363	0	\$31,047	\$20,773	\$25,063	\$31,905	\$37,446
7. Medical assistants	7,522	183	1,250	\$35,109	\$26,670	\$30,289	\$35,683	\$40,182
8. Office clerks, general	38,790	943	0	\$36,547	\$21,898	\$28,054	\$39,576	\$48,288
9. Fitness trainers & aerobics instructors	6,775	165	194	\$39,295	\$20,316	\$28,692	\$43,076	\$53,261
10. Medical secretaries	5,563	135	261	\$38,085	\$27,079	\$32,096	\$39,361	\$46,061

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 - EMSI 2017.3 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. There are more than 100 private and religious accredited institutions and more than 350 private occupational and technical schools offering courses in dozens of program areas throughout the state. The state higher education system served about 255,510 students in FY 2015-16, while 86,070 students received a degree, diploma, certificate, or other formal award over the same period of time. 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://highered.colorado.gov>.

- Colorado State University www.colostate.edu
- Colorado State University Global Campus www.colostate.edu
- Front Range Community College www.frontrange.edu
- Metropolitan State University of Denver www.msudenver.edu
- Red Rocks Community College www.rrcc.edu
- Regis University www.regis.edu
- University of Colorado Anschutz Medical Campus www.ucdenver.edu
- University of Colorado Boulder www.colorado.edu
- University of Colorado Denver www.ucdenver.edu
- University of Denver www.du.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 ranked among the top 10 healthiest states in the nation and had the lowest prevalence of obesity and physical inactivity. (United Health Foundation, 2017)
- Colorado ranked as the second-most physically active state in the nation with over 84 percent of adults participating in physical activity in the past month. (The Henry J. Kaiser Family Foundation, 2017)
- Denver ranked second on Healthgrades' National Health Index, a list of the 25 U.S. cities leading the way in healthcare. Healthgrades measured population health, access to care, risky behaviors, and hospital quality. (Healthgrades, 2017)
- Colorado ranked fourth among the 50 states in the United Health Foundation's "America's Health Rankings Senior Report" in 2017. Colorado's seniors have low obesity rates and high rates of physical activity. (United Health Foundation, 2017)
- Douglas County ranked as the healthiest county in Colorado. The City and County of Broomfield (second), Boulder (third), and Larimer (ninth) were also included in the top 10. (University of Wisconsin Population Health Institute, 2017)
- The University of Colorado Denver's Anschutz Health and Wellness Center is a state-of-the-art research, education, and patient care facility that has been featured on ABC's Extreme Weight Loss.

Denver ranked second among 25 U.S. cities leading the way in healthcare.

—Healthgrades, 2017

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

- Boulder has the lowest prevalence of diabetes in the nation, with 4.1 percent of its adult population diagnosed. (Centers for Disease Control and Prevention, 2017)
- Boulder (first) and Fort Collins (10th) ranked among the top 10 "2017 Healthiest Cities in America." (Niche.com, 2017)
- Nearly 40 percent of Coloradans have at least a bachelor's degree, the second-highest college attainment rate in the nation behind Massachusetts. (U.S. Census Bureau, 2016 American Community Survey)
- Denver ranked among the top 10 "Best Cities for Young Professionals" in 2017. (*Forbes*, 2017)
- Colorado ranked ninth for the number of science, engineering, and health graduate students per 1,000 individuals ages 25 to 34 years old. (National Science Foundation, 2017)

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

- The University of Colorado School of Medicine ranked eighth nationally for primary care, with the specialties of family medicine (third), pediatrics (sixth), and rural medicine (sixth) also ranking high. The School of Medicine ranked 35th for research. (*U.S. News & World Report*, 2017)
- Regis University's Master's in Health Services Administration ranked among the top 10 best online programs. (Master Programs Guide, 2017)
- The Red Rocks Community College Physician Assistant Program is the only master's degree-offering community college program in the U.S. (Red Rocks Community College, 2017)
- The University of Colorado School of Medicine is home to five health professional schools in dental medicine, medicine, nursing, pharmacy, public health, and the Graduate School offering 40 degree programs and educating 4,000 degree-seeking health professionals. (University of Colorado, 2017)
- The Colorado School of Public Health is the first accredited and only collaborative school of public health in the Rocky Mountain region. (The Colorado School of Public Health, 2017)
- The Skaggs School of Pharmacy and Pharmaceutical Sciences at the University of Colorado is one of the nation's top 25 ranked pharmacy schools and seventh in the nation for total National Institutes of Health funding among pharmacy schools. (University of Colorado, 2017)

CU School of Medicine ranked eighth nationally for primary care.

—U.S. News & World Report, 2017

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

HEALTHCARE AND WELLNESS:

Metro Denver and Northern Colorado Industry Cluster Profile

- Several nine-county region hospitals received Healthgrades awards in 2017. Twelve earned the 2017 Distinguished Hospital Award for Clinical Excellence, five were named among "America's 100 Best Hospitals," and eight received awards for Outstanding Patient Experience. (Healthgrades, Inc., 2017)
 - Colorado's healthcare system ranked as the sixth-best in the nation, according to the "Scorecard on State Health System Performance." (The Commonwealth Fund, 2017)
 - Colorado tied for the shortest average emergency room wait time in the nation with Utah, recording an average of 14 minutes. (ProPublica, 2017)
- Metro Denver is home to 10 hospitals that have achieved Magnet® designation, the highest credential for nursing excellence. (American Nurses Credentialing Center, 2017)
- The Barbara Davis Center for Diabetes is one of the largest diabetes institutes in the world, specializing in type 1 diabetes research and care for children and adults. (The Barbara Davis Center for Childhood Diabetes, 2017)
- 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. (Colorado Center for Reproductive Medicine, 2017)
- 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. (HCA-HealthONE, 2017)

Colorado's healthcare system ranked as the sixth-best in the nation.

—The Commonwealth Fund, 2017

5. An overall better quality of life

- Denver was named as the second-best place to live in the U.S. in 2017. The city's desirability, prominent research institutions, and growing job market contributed to its notable rank. (*U.S. News & World Report*, 2017)
- The city of Lone Tree ranked seventh in the "Best Places to Live" list. Superior (49th) and Louisville (50th) were named to the list's top-50 locations. (*MONEY Magazine*, 2017)
- Fort Collins (16th), Boulder (35th), Littleton (49th), Lakewood (57th), Longmont (62nd), and Centennial (97th) ranked among the 2017 list of the "100 Best Places to Live." (Livability.com, 2017)
- Denver ranked No. 8 among the 2017 "Best Places to Retire." (Zumper, 2017)
- FasTracks is a multibillion dollar comprehensive transit expansion plan to build 122 miles of new commuter rail and light rail, extend existing routes, and expand the regional bus network across the eight-county district.

Denver was named as the second-best place to live in the U.S. in 2017.

—U.S. News & World Report, 2017

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