

PHOENIX FORWARD »

strengthening the road to prosperity





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Phoenix Forward is a coordinated, strategic approach to economic development established by the Greater Phoenix Chamber of Commerce (GPCC) in collaboration with the Arizona Commerce Authority, the City of Phoenix and Maricopa County. This initiative is designed, developed and driven by the business community to focus on a more robust, dynamic business retention and expansion effort. **Phoenix Forward** connects with and supports local businesses in target industry sectors poised for growth and expansion. The four industry sectors are:



**TRANSPORTATION
& LOGISTICS**



BIOSCIENCE



HEALTH CARE



Todd Sanders

President & CEO,
Greater Phoenix
Chamber of Commerce

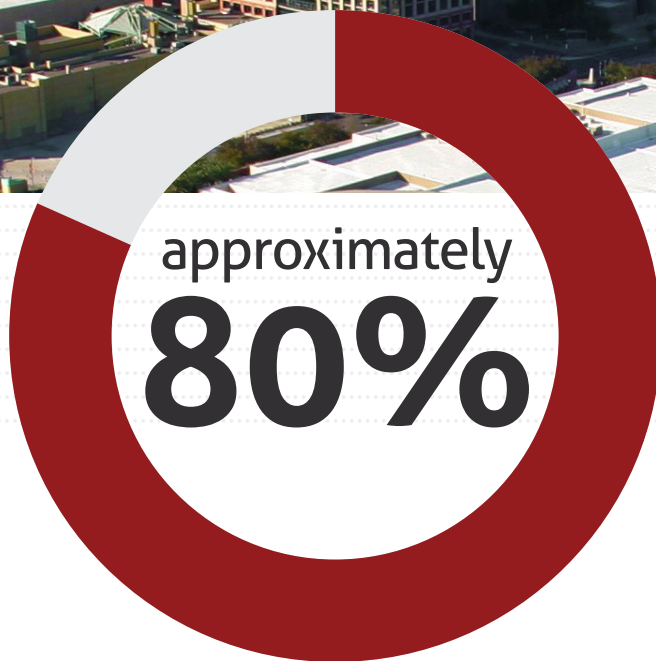


"The **Phoenix Forward** initiative brings the resources of our collaborative partnership with the Arizona Commerce Authority, the City of Phoenix and Maricopa County to the front doors of businesses in targeted industries. This initiative creates a coordinated and focused business retention and expansion strategy. Together, we remove barriers to success, enabling local businesses to continue to thrive, grow and create jobs. We value your support and partnership in facilitating the growth and sustainability of our economy."

JOB GROWTH



Approximately 80 percent of new jobs come from the expansion of existing companies within the community.



ARIZONA
COMMERCE
AUTHORITY



City of Phoenix





PHOENIX FORWARD » BIOSCIENCE LEADERSHIP COUNCIL

Arizona is a bioscience state on the rise.

Greater Phoenix and Arizona are powerful hubs for the fast-growing bioscience industry. Since 2002, jobs in this industry have grown at three times the national average.

Arizona's bioscience industry employs more than 110,000 people and has an annual economic impact of \$14 billion on the state. That figure shoots up to \$36 billion when hospitals are included. Since the launch of Arizona's Bioscience Roadmap in 2002, our state has achieved what many have taken more than 40 years to accomplish.

The Phoenix Biomedical Campus has a \$1.3 billion economic impact as a one-of-a-kind collaboration between all three state universities, several hospitals and the Translational Genomics Research Institute (TGen). It competes with other bioscience hubs in San Diego, Seattle, Maryland, the Research Triangle in North Carolina and as far away as Singapore.

Given the significant progress Arizona has achieved in growing this highly impactful sector, it is critical to continue to nurture and grow the innovative bioscience companies that have emerged and planted roots here by facilitating mutually beneficial collaborations and leveraging available resources.

Who is involved

Phoenix Forward's Bioscience Leadership Council convenes the region's innovators, driving the latest advances in bioscience, research and personalized medicine. The council is led by Thomas J. Sadvary, CEO of HonorHealth and Dr. Robert Bowser, Chairman, Division of Neurobiology of Barrow Neurological Institute.

The council's priorities are to create opportunities that ignite growth for existing bioscience companies in the region and further the implementation of Arizona's Bioscience Roadmap.

In addition, the council advocates for public policies that strengthen and support bioscience expansion and Arizona's competitive advantage in the industry.

The co-chairs are joined by leaders from national and global bioscience companies, research institutions and support organizations, including:

- **Dirk Karsten Beth**, *Managing Director and Founder*, Hyalescent Ventures
- **Tess Burtlesen, CPA, MBA**, *Chief Operating Officer and President*, TGen Health Ventures
- **Sergio Gazic**, *Bioscience Portfolio Manager*, Arizona Commerce Authority
- **MaryAnn Guerra, MBA**, *Chairman of the Board, CEO, and Co-Founder*, BioAccel
- **Joshua L. LaBaer, Ph.D.**, *Interim Executive Director*, ASU
- **Jeffrey D. Morton, Ph.D.**, *Associate*, Snell & Wilmer
- **Kerri Robinson**, *Director, Program Development*, The Biodesign Institute at ASU
- **Janet Spear**, *Executive Director and Plant Manager*, Celgene Corporation
- **Sarah A. Strunk**, *Chair of the Board of Directors*, Fennemore Craig, PC
- **Russ Yelton**, *CEO*, Pinnacle Transplant Technologies

Goals

- Strengthen business-to-business connectivity and engagement to facilitate collaboration among the region's companies.
- Improve the talent pipeline by reducing time to fill high-demand positions and increase student retention.
- Improve the entrepreneurial ecosystem and increase access to capital.
- Advocate for policies that strengthen the industry.



CO-CHAIR

Thomas J. Sadvary

CEO
HonorHealth



CO-CHAIR

Robert Bowser, PhD

Chairman, Division of
Neurobiology
Barrow Neurological
Institute

To learn more about the Bioscience Leadership Council, contact
**Economic Development Project
Manager Jocelyn McAlpin at**
jmcAlpin@phoenixchamber.com.



PHOENIX FORWARD »

Sarah A. Strunk
Fennemore Craig, PC



"Cutting edge discoveries and advances in bioscience by innovative companies in Arizona are driving our economy, creating high-wage jobs for residents and improving our health through the commercialization of these technologies. It is imperative to support an ecosystem that empowers entrepreneurial minds and their early-stage companies to grow and thrive in Arizona."

Phoenix Biomedical Campus

» 2013
economic impact

\$1.3 billion

» 2025 *estimated*
economic impact

\$3.1 billion



ECONOMIC IMPACT

The bioscience industry is one of the most innovative, dynamic, impactful and vital drivers of the Greater Phoenix region's economy.

\$14
BILLION

The bioscience industry delivers an annual economic impact of **\$14 billion**. (\$36 billion with hospitals included.)

\$62
THOUSAND

The average wage for Arizona's bioscience employees is **more than \$62,000**.

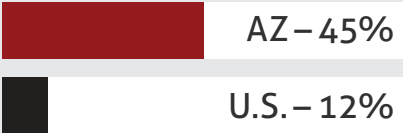


The bioscience industry supports more than **106,000 jobs**.

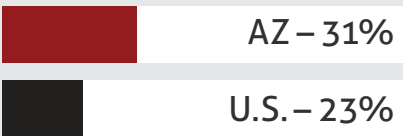


Home to **1,300 dynamic and innovative bioscience companies**

Job Growth



Company Growth



ARIZONA STATE UNIVERSITY'S BIODESIGN INSTITUTE

\$42
MILLION

Was awarded **more than \$42 million** for research in fiscal year 2015.

11

11 research centers



200+

200+ active research projects

350
THOUSAND

350,000 square feet for research



PHOENIX FORWARD » HEALTH CARE LEADERSHIP COUNCIL

Innovation develops the personal health care work force

The region is home to more than 4,500 health care companies that employ more than 195,000 people. The region is ranked 14th in the nation for health care jobs with Phoenix leading the way as the top-ranked city. The region ranks second in availability of a skilled health care workforce. In Arizona, hospitals alone employ more than 80,000 people and contribute \$11.5 billion to the gross state product.

The Greater Phoenix region boasts internationally prominent research and treatment facilities, including Banner M.D. Anderson Cancer Center, Barrow Neurological Institute, Cancer Treatment Centers of America, Mayo Clinic, Phoenix Children's Hospital and Translational Genomics Research Institute (TGen). Fourteen of the region's hospitals are ranked with high-performing specialties and of these, four have one or more nationally ranked specialties.

Innovative collaborations, such as the one between Arizona State University and Mayo Clinic, are advancing personalized medicine and health care delivery for the region and will continue to have a vital impact on the region's economy.

Who is involved?

Phoenix Forward's Health Care Leadership Council is a catalyst for facilitating connections and collaborations which drive business growth and prosperity for the region. The council is made up of industry leaders chaired by Linda Hunt, CEO of Dignity Health of Arizona.

- **Peggy Chase**, *President and CEO*, Terros
- **Joseph G. Gaudio, C.P.A.**, *President and CEO*, UnitedHealthcare Community Plan of Arizona
- **Christina Noble**, *Vice President Business Development*, Sonora Quest Laboratories
- **Suzanne Pfister**, *President and CEO*, Vitalyst Health Foundation
- **Teri Pipe, Ph.D., RN**, *Chief Well-Being Officer, Dean and Professor*, ASU, College of Nursing and Health Innovation
- **Matt Sesto**, *Market Vice President of Store Operations*, Walgreens Co.
- **Matt Silverman**, *Vice President and Managing Director*, R&R Partners
- **Carrie Smith**, *Chief Operating Officer*, Foundation for Senior Living
- **Jeff Stelnik**, *Vice President, Strategy, Sales and Marketing*, Blue Cross Blue Shield of Arizona
- **Kip Welch**, *Vice President Talent Acquisition*, Phoenix Children's Hospital
- **Brian White**, *President*, Stryker Sustainability Solutions

Goals

- Create a stronger talent pipeline by expanding incentives and reducing barriers for medical professionals
- Promote *Wellness AtoZ*, a program of GPCF designed to make the Greater Phoenix region a health destination for talent
- Promote and leverage the region's health care assets, connecting health care providers, payers and educators
- Advocate for policies that strengthen the health care industry



CHAIR

Linda Hunt

CEO

Dignity Health
of Arizona



VICE CHAIR

Dr. Steve Narang

CEO

Banner University
Medical Center

To learn more about the Transportation & Logistics Leadership Council contact **Economic Development Project Manager Jocelyn McAlpin** at jmcAlpin@phoenixchamber.com.



PHOENIX FORWARD » HEALTH CARE LEADERSHIP COUNCIL

#1

Phoenix is **the best city** for health care jobs

#2

Region **ranks second** in availability of a skilled health care workforce.

A total of **14 of the region's hospitals are ranked with high-performing specialties** and of these, four have one or more nationally ranked specialties.





World-class research and treatment facilities:

- Banner M.D. Anderson Cancer Center
- Barrow Neurological Institute
- Cancer Treatment Centers of America
- Mayo Clinic
- Phoenix Children's Hospital
- Translational Genomics Research Institute (TGen)

The University of Arizona College of Medicine

– Phoenix/Health Sciences

- UA Colleges on Campus
 - Medicine – Phoenix
 - Public Health
 - Nursing
 - Pharmacy
- Annual Economic Impact **\$961 million**
equivalent of two  
Super Bowls
- Employment Growth | **7,185 jobs**
- Taxes Generated | **\$44 million**

Arizona: Innovative collaborations advance personalized medicine and health care delivery

The region is continually expanding its existing medical programs such as A.T. Still University, Arizona State University's Biomedical Informatics, Northwestern University and the University of Arizona College of Medicine-Phoenix. These medical programs have vital economic impacts on the region's economy.

Destination medicine

Destination medicine, or traveling for the purpose of obtaining medical treatment, officially became a global industry in 2012. The expected market size is \$100 billion with an annual growth rate between 20-30 percent. Economic growth of this industry is driven by attracting medical tourists from outside of the region. The region is perfectly positioned to develop this segment of health care by leveraging its world-class research and treatment facilities and raising their visibility in the global marketplace.

Arizona job growth

Hospital Employment

Arizona – 46% increase

Nationwide – 24% increase

1990

Today



ECONOMIC IMPACT

The health care industry is one of the most innovative, dynamic and impactful drivers of the Greater Phoenix region's economy.



The region is home to more than **4,500 health care companies.**



The region's health care industry employs more than **195,000 people.**

Midwestern University

» economic impact

\$423.2 million

A recent study by Applied Economics shows Midwestern University's program by itself has an estimated \$423.2 million economic impact on the region.



PHOENIX FORWARD » TRANSPORTATION & LOGISTICS LEADERSHIP COUNCIL

The Greater Phoenix region is a crucial gateway for international commerce, linking businesses to domestic and global markets.

Greater Phoenix is ideally positioned for global business with convenient access to the busy California markets and international trade with Mexico. A robust transportation system that includes highways, rails and bustling Sky Harbor International Airport will continue to foster rich and dynamic trade relationships.

The region is home to more than 2,900 transportation and logistics companies, employing approximately 97,000 people. The air transportation network of Greater Phoenix has a direct annual economic impact of more than \$30 billion, serving more than 42 million passengers and transporting more than 328,000 tons of air cargo annually. Flights from Phoenix travel to 89 locations within the United States and 17 cities internationally including destinations in Norway, Sweden, Greenland, Mexico, India and Canada.

A stronger, more competitive industry is the catalyst for business expansions and the creation of additional highly skilled, high-wage jobs in transportation and logistics companies as well as businesses that depend on a strong transportation network.

Who is involved

Phoenix Forward's Transportation & Logistics Leadership Council explores industry trends and public policy issues that impact critical transportation infrastructure and addresses industry challenges and opportunities. The council is led by Mary Peters, former Director of the Arizona Department of Transportation and former Secretary of the U.S. Department of Transportation, and Karrin Kunasek Taylor, Founder and President of Arizona Strategies.

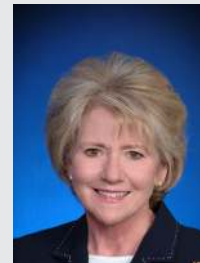
The council advocates for effective infrastructure investment for the region's transportation, supply chain and logistics industry. The council works collaboratively to boost the region's competitiveness by elevating and driving public dialogue around vital issues impacting funding, road maintenance, congestion management and the movement of people, materials and products by road, air and rail.

The co-chairs are joined by leaders in the transportation, supply chain and logistics sector, including:

- **David Berry**, *Vice President*, Swift Transportation, Inc.
- **Chad A. Freed**, *General Counsel & Executive Vice President of Corporate Development*, Universal Technical Institute, Inc.
- **Alan Maguire**, *President and Principal Economist*, The Maguire Company
- **Shawn Merle**, *Sr. Manager Carrier Contracts*, PetSmart, Inc.
- **David Skinner, P.E.**, *Vice President, Area Operations Manager*, HDR Engineering, Inc
- **Victor D. Vidales III**, *Owner & Founder*, RE/MAX New Heights Realty
- **Marisa Walker**, *Senior Vice President, Strategic Planning / Infrastructure*, Arizona Commerce Authority
- **Jeff Williamson**, *Senior Vice President/Division Manager, Heavy Civil Construction*, Sundt Construction, Inc.
- **Mark Yalung, P.E.**, *Vice President, Arizona Area Manager*, Parsons Brinckerhoff

Goals

- Build the industry's image to strategically enhance infrastructure investments to retain, strengthen and grow existing businesses by:
 - > Increasing public awareness;
 - > Defining criteria for prioritizing high-value projects; and
 - > Supporting transportation funding.
- Advocate for policies that strengthen the industry.



CO-CHAIR

Mary E. Peters

President & CEO

Mary E. Peters
Consulting Group, LLC



CO-CHAIR

Karrin K. Taylor

Founder
and President,
Arizona Strategies

To learn more about the Transportation & Logistics Leadership Council, contact **Economic Development Project Manager Jocelyn McAlpin** at jmcalpin@phoenixchamber.com.



PHOENIX FORWARD »

TRANSPORTATION & LOGISTICS LEADERSHIP COUNCIL

Zoe Richmond
Union Pacific Railroad



"A robust economy benefits from robust multi-modal transportation options. Ongoing advocacy and investment in air cargo, roads and rail will open the door to new economic opportunities."



Trucks deliver **90 percent** of all freight moved within Arizona.

#2

Arizona ranks **second in the nation** in terms of goods shipped by air.



Approximately **70 percent** of companies state that airports are an important factor in future location decisions.

Arizona: A growing transportation and logistics hub

Arizona is uniquely and strategically located as a gateway for international trade. The Southwest region provides a number of advantages that establish Phoenix as a transportation and shipping hub, not only for nearby destinations within Arizona, California, Texas, Mexico and the Southwest, but also for shipping and receiving destinations throughout North America.

Transportation and logistics companies in Greater Phoenix understand the significance of growing the region's role as a Southwest hub for logistics and transportation. Economic development and investment in the sector can provide local, national and global businesses with an improved ability to move goods, services and people.

Arizona job growth

The logistics industry is seen as one that benefits from a highly skilled workforce, but has relatively low costs and regulatory barriers. Phoenix will continue to attract companies who value the advantages the region's growing transportation systems have to offer.

ECONOMIC IMPACT



More than **2,900 transportation and logistics companies** employ approximately **97,000 people**.

The air transportation network of Greater Phoenix

**\$30
BILLION**

Has a direct annual economic impact of more than **\$30 billion**

Serves more than **42 million passengers**



tons

Transports more than **328,000 tons** of air cargo annually



PHOENIX FORWARD »

strengthening the road to prosperity

EST
1888

STRATEGIC PRIORITIES

- **Business outreach for retention and expansion:** An aggressive outreach program focused on connecting businesses to resources, building sustainable relationships and obtaining statistical data.
- **Industry intelligence:** Data collected through BRE visits is aggregated with partner data and analyzed to identify trends and strategize on key economic indicators.
- **Regional image building:** In collaboration with other organizations, GPCC promotes business growth and generates positive exposure for the region.
- **Policy and advocacy:** Leveraging its well-established reputation at all levels of government, GPCC advocates on behalf of industry sectors.

LEADERSHIP COUNCILS

Led by co-chairs in their respective industries, leadership councils facilitate knowledge-sharing for the mutual benefit of the targeted industry businesses to compete more effectively both nationally and internationally. The leadership councils analyze and act on intelligence gained through business outreach efforts and industry trends to strengthen the industry sector.



Russ Johnson

President & CEO,
Merchants Information
Solutions, Inc.

"We believe in *Phoenix Forward* because it is a collaborative way to look at expansion and growth of business. This joint process is what we believe will become a best practice and will significantly impact how business is done in our city and will influence the expansion opportunities of businesses throughout the region."



Russ Yelton

CEO,
Pinnacle Transplant
Technologies

"The collaboration between the City of Phoenix, Arizona Commerce Authority, Maricopa County and the Greater Phoenix Chamber of Commerce truly makes our region stand out from others. This collaboration makes it easy to do business, connect to resources and coordinate business retention and expansion services. The *Phoenix Forward* Initiative creates a pro-business environment that allows companies like ours to grow and expand at a much faster rate."

For more information on *Phoenix Forward*

www.phxforward.com

Jennifer Mellor

Vice President of Economic Development

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PHOENIX FORWARD » INVESTORS

FOUNDERS



CHAMPIONS



An Independent Licensee of the Blue Cross and Blue Shield Association



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Delta Dental of AZ
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DMB

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Flinn Foundation
HonorHealth
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Community Tire Pros
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Gregorio Garcia

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