

THE HEALTH CARE IMPACT

ASSESSING THE SCOPE AND DEPTH OF THE HEALTH
CARE INDUSTRY IN DALLAS-FORT WORTH

2013-14

DALLAS
REGIONAL
CHAMBER®

www.dallaschamber.org

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CONTENTS

- | | | | |
|-----------|---|-----------|-----------------------------------|
| 3 | Executive Summary | 16 | Education |
| 4 | Why Dallas | 18 | Health Care Industry Clusters |
| 6 | Economic Impact - Health Care Industry | 20 | Life Science Industry Clusters |
| 8 | Economic Impact - Relocations
and Expansions | 22 | Core Strengths |
| 10 | Construction Projects | 24 | Accelerators and Incubators |
| 12 | Major Companies | 26 | Investment Activity |
| 14 | Wages and Salaries | 28 | Accolades and Regional Statistics |



EXECUTIVE SUMMARY

Previously, the Dallas Regional Chamber engaged in extensive research to estimate the impact of the health care industry on the North Texas economy. The health care industry in the Dallas Fort Worth region has a value of \$52 billion annually, positioning it to be one of the largest sectors of the DFW region, representing about 15% of all regional economic activity. One of our most recent publications, the Health Care Impact Brochure, documented these analyses by identifying health care specific industries and the estimated value of their contributions.

In our 3rd edition of this brochure, we have included more in depth and updated information, and also a name change of the Health Industries Review. The brochure identifies health care industries and showcases the region's assets and ecosystem of connections, including life science, health care services, manufacturing, and research.

The Dallas Regional Chamber (DRC) advocates for affordable, high-quality health care as an important factor in recruiting businesses and talent to the DFW area and ensures the region's competitiveness. The brochure is designed to support the work of stakeholders that are vital to the growth of the DFW area and the region's health care industries. Key stakeholders include state legislators in Austin, key federal Congressional representatives, regional city council representatives and economic development organizations, universities, industry institutions and agencies, health care associations, health care companies both in DFW and throughout the U.S., and site selection consultants that serve health care companies.

This year, in an effort to showcase our regional assets equally, the Dallas Fort Worth Hospital Council (DFWHC) has become our presenting sponsor.

The Dallas Regional Chamber is committed to supporting the health care industries. The DRC health care initiatives mission is to develop, promote and sustain the greater Dallas region as a global leader in health care talent, infrastructure, innovation, and research. The DRC is committed to enhancing hospital value by continually promoting patient safety and cost effective quality health care in our region. We will continue to engage the health care executives, service providers, and business community in significant health care initiatives that include economic development, legislative advocacy, and top educational programming.

For additional information, visit www.dallaschamber.org.

D A L L A S
R E G I O N A L
C H A M B E R®

A MESSAGE FROM THE DFW HOSPITAL COUNCIL

North Texas hospitals and hospital systems provide vital access to health care 24 hours a day, seven days a week. These medical professionals deliver continuous patient care in a compassionate manner, annually receiving national recognition for adult, pediatric and neo-natal specialty services. The research, education and development of innovational treatments have been recognized world-wide. North Texas hospitals and hospital systems are large employers, creating over 240,000 jobs and injecting billions of dollars into the economy through employee salaries, retail sales and sales taxes. Hospitals provide jobs for an immense range of skill levels with opportunities for upward mobility in the profession. These jobs include physicians, nurses, therapists, researchers, accountants, human resources, food services and materials management, as well as many other facility positions. The combined team of a hospital's workforce represents its greatest asset – caring employees delivering needed services to the North Texas community.

The 80 member hospitals of the Dallas-Fort Worth Hospital Council work collaboratively on regional issues, focusing on advocacy, efficiency, patient safety and effective outcomes for area patients in need.



Why Dallas

We're Dallas, and you belong here. Why? Because, with a business climate that is more than favorable, a workforce that is highly skilled and highly educated and a location that is about as close to perfect as they come, business works better here. Low taxes, a low cost of doing business, and a business-friendly environment not just in the Dallas region, but also the State of Texas. Those are just a few of the reasons why 18 Fortune 500 companies, 12 Forbes top private companies, and nearly 40 among the Fortune 1000 call the region home. It's also our people. We have 12 four-year universities in the region and seven community college districts. That, combined with a population that is growing by one person every four minutes, provides a robust workforce. And it is our accessibility. Due to DFW's central location and world-class transportation infrastructure, it's easy to do business locally, nationally, and globally.

5TH LOWEST COST OF DOING BUSINESS IN THE UNITED STATES AND 15TH AMONG INTERNATIONAL CITIES
KPMG GUIDE TO INTERNATIONAL BUSINESS LOCATION



COST OF DOING BUSINESS

100 = US Average

THE DALLAS-FORT WORTH REGION HAS ONE OF THE LOWEST COSTS OF DOING BUSINESS AMONG MAJOR METROPOLITAN AREAS.



	BOSTON	CHICAGO	LOS ANGELES	NEW YORK	PHILADELPHIA	SAN DIEGO	SAN FRANCISCO
LABOR	121	106	98	112	120	101	121
UTILITIES	169	99	129	226	125	175	137
STATE & LOCAL TAX	93	93	98	127	100	98	99
OFFICE	147	102	119	179	77	98	104
OVERALL COST	135	104	106	145	106	108	118

WHY DALLAS HEALTH CARE?

- » Critical mass in key industry clusters: Health IT, Research & Care, Medical Device, and Supplies
- » Growing labor force of health care knowledge workers
- » Rapidly growing demand for health care goods and services.



THE BUSINESS ENVIRONMENT

TEXAS #1 STATE FOR DOING BUSINESS

CEO BUSINESS CLIMATE
RANK, 2013

0% State and local income tax rate.

LOCAL AND STATE TAX INCENTIVES AND CASH GRANTS.

Cities in our region are ready to offer abatements, rebates, exemptions & grants.

WORKFORCE

The Dallas regional economy is among the most diverse in the nation, which means companies can draw from a deep base of skilled workers.

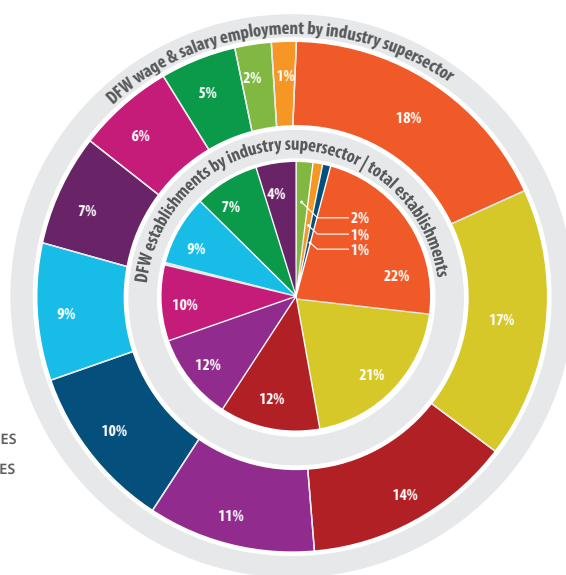
54,109

Number of Associates, Bachelors, and Masters degrees awarded in 2010-2011 by Dallas region institutes of higher education



Over 3.3 Million

- NATURAL RESOURCES AND MINING
- GOVERNMENT
- FINANCIAL ACTIVITIES
- OTHER SERVICES
- LEISURE AND HOSPITALITY
- CONSTRUCTION
- MANUFACTURING
- INFORMATION
- TRADE, TRANSPORTATION AND UTILITIES
- PROFESSIONAL AND BUSINESS SERVICES
- EDUCATION AND HEALTH SERVICES



ACCESSIBILITY

Central US location featuring Dallas-Fort Worth International Airport



200

NON-STOP
DESTINATIONS

52

INTERNATIONAL
DESTINATIONS

148

DOMESTIC
DESTINATIONS

8,000,000 PASSENGERS

Dallas Love Field, just seven miles from Downtown Dallas, serves more than 8 million passengers a year. It is also the home to Southwest Airlines.

AVERAGE DRIVE TO WORK

0 : 26 : 45
HOURS MINUTES SECONDS



1,200,000

Number of residents added to the region between 2000 and 2010

10,500,000

Projected population of the region by 2040

Economic Impact – Health Care Industry

Health care touches the lives of nearly everyone in the Dallas-Fort Worth region at some point and what happens in the health care sector is felt throughout our regional economy. These effects are captured by measuring the linkages among the various sectors within the economy. These linkages are both direct and induced. For example, a hospital purchases surgical instruments, bed linens, and cleaning supplies as a part of their operating expenditures. In turn, the supplier of cleaning supplies pays rent on an office, pays for local transportation, and hires an accountant to prepare their tax returns, all of which are included in indirect impacts. Induced impacts capture the economic activity associated with employees of the hospital, cleaning supply company, and the accountant spending a portion of their earnings for goods and services in the region. Overall, the value added by the health care industry in this region exceeds \$52 billion per year, putting this industry among the largest sectors of the Dallas-Fort Worth region representing about 15 percent of all regional economic activity.

SNAPSHOT

Even during periods of economic volatility and uncertainty, the health care industry is one of the strongest employment sectors and drives employment growth in the national economy. In addition, health care industry jobs are difficult to outsource and do not pick up and move to better economic climates during difficult times. The health care industry in DFW is expected to continue to grow as our population expands and as baby boomers age. As a result, the overall economic impact of the DFW health care industry will likely continue to increase in the coming years.

\$52 BILLION

In total value added to the regional economy annually by the Dallas-Fort Worth health care industry

601,000 JOBS

Supported by the health care industry in DFW

15% OF THE DFW ECONOMY



The health care industry plays an essential role in the DFW economy, and is one of the largest economic sectors in the region.

\$49
BILLION

Based on the number of jobs, the direct output of the DFW health care industry was about \$49.4 billion dollars in 2010. In addition, property income in the form of rents, royalties, dividends, and corporate profits increased \$13.3 billion in the region. And even though many of the entities in the delivery of health care services operate as non-profits, indirect taxes in the form of property taxes, sales taxes, and fees boosted state and local public sector revenues by \$2.9 billion.

331,000

The DFW health care industry directly supports almost 331,000 jobs in the DFW region. Health care services, including hospitals, offices of physicians, dentists, etc. dominate health industry landscape employing over 281,000 people.

\$36
BILLION

The DFW health care industry supports \$36 billion in annual salaries, wages, and benefits.

\$6.6
BILLION

From 2005-2015, over \$6.6 billion in health care industry related construction projects have been completed or are expected to be completed. These construction projects indirectly employ thousands of people, from architects, lawyers, engineers, material fabricators, and more. In total, these projects will generate over \$11 billion in economic activity.

Economic Impact- Relocations & Expansions

Economic impact analyses examine the effects of policies or economic activities within a given area. A change in a company's operations often generates effects in multiple sectors within an economy. The impact is typically measured by the associated changes in jobs or wages in addition to that of the original company's actions. Corporate site selection projects are often analyzed to determine their impact on areas such as real estate development, tax revenues, and the effects on other industries. The health care industry is among the fastest growing sectors in the economy, and demographic trends indicate a high probability this will continue. Health care companies are attracted to the Dallas-Fort Worth region for numerous reasons such as the size and quality of the local labor force, the lower operational costs, and proximity to their rapidly growing customer base. Companies within industries such as medical device or pharmaceutical manufacturing insurance providers and headquarter operations can easily find suitable supply chain vendors in the region. Their economic activities create a ripple effect that benefits a wide variety of industries and occupations. A strong health care industry plays an important role in a community's vitality and sustainability. As more companies choose to call Dallas-Fort Worth home, the region will continue to experience economic viability through the residual effects of employment and income growth.

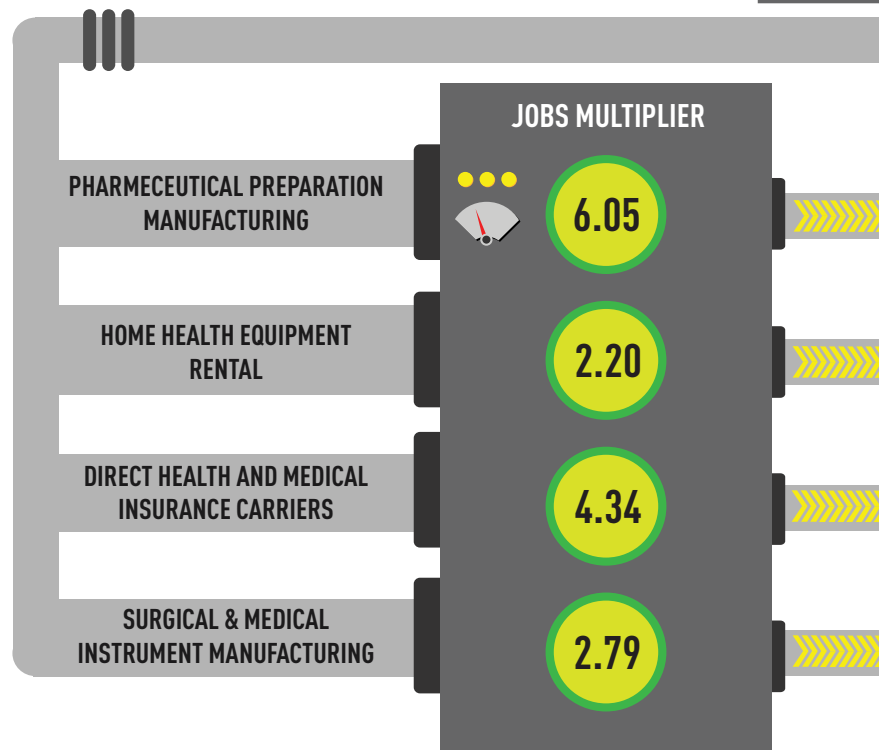


INJECTING GROWTH INTO THE DFW ECONOMY

A company's operations can have a far reaching effect on the local economy. The relocation or expansion of firms in a region affects multiple industries and occupations through multiplier effects that can magnify job creation. Relocations and expansions in the health care industry and its subsectors often have larger impacts on the regional economy than many other industries.

FOR EVERY 100 JOBS ADDED BY A COMPANY

Companies that expand in a region create demand for goods and services, and those companies respond by hiring additional staff to meet that demand. For every 100 jobs added by a company the multiplier effect estimates the total change in employment. A multiplier of 2.0 estimates an additional 100 employees would be hired by other companies for a total of 200 net new jobs.



RECENT HEALTH CARE INDUSTRY RELOCATIONS OR EXPANSIONS TO DALLAS-FORT WORTH

STATE FARM INSURANCE (2012) plans to consolidate operations in a new regional office located in Richardson. It will be the anchor a \$1.5 billion mixed-use transit development.

UNITEDHEALTH GROUP (2012) created nearly 1,500 new jobs in Texas, including 800 at Connections, in the Dallas area.

HEALTHPOINT BIOTHERAPEUTICS (2012) will open a new, 25,000 SF state-of-the-art cell sciences manufacturing facility with labs and clean room space for the production of cell-based therapies.

GREATBATCH INC. (2012), a medical manufacturing company, relocated its global headquarters from Buffalo, NY to Frisco to take advantage of an already-established medical device cluster in the Dallas-Fort Worth area.

INOGEN INC. (2012), a California-

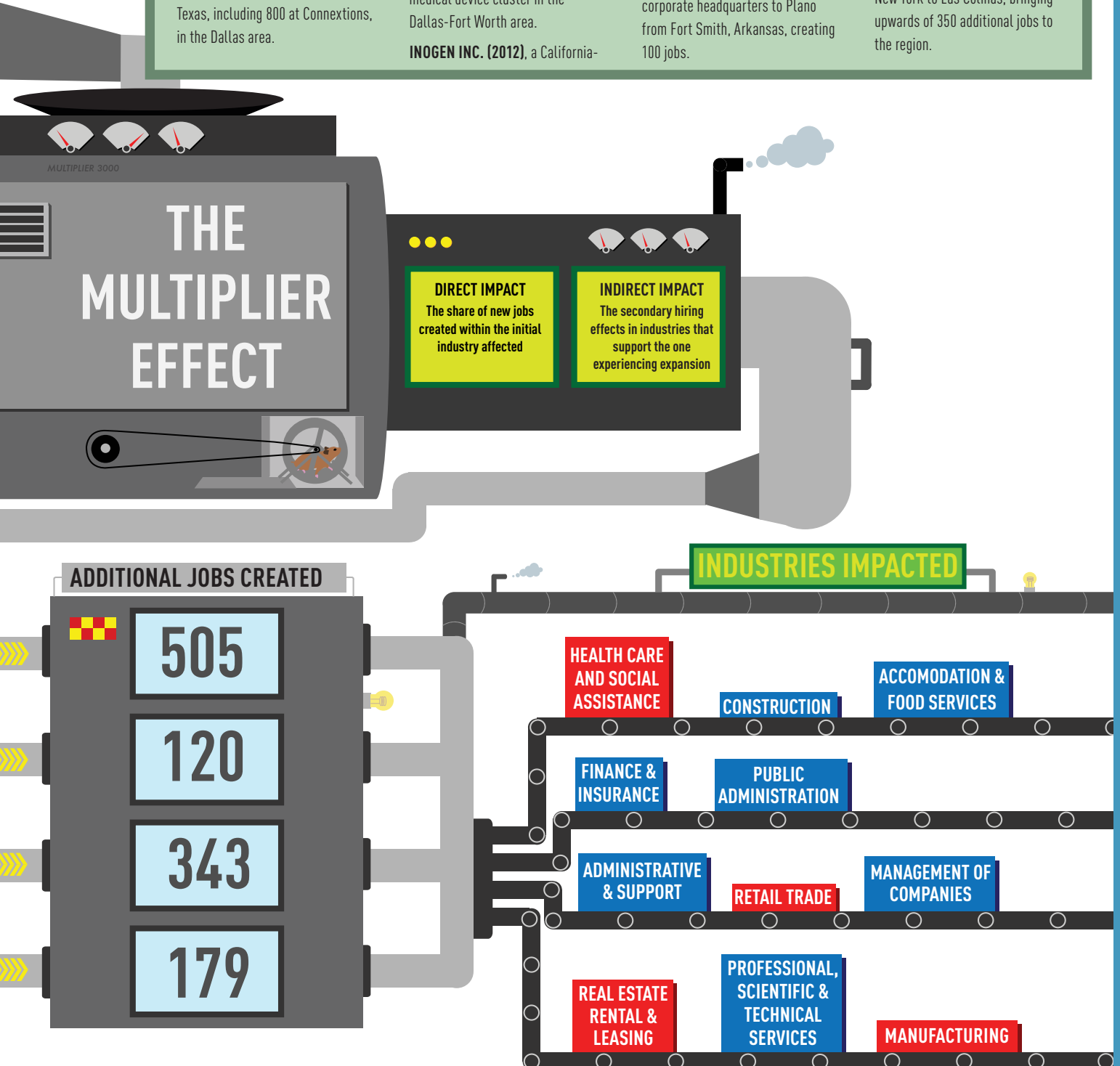
based manufacturer and oxygen therapy equipment and services provider, opened a corporate office in Richardson and hire 200 employees in the next 18 months.

CHRISTUS HEALTH (2012), consolidated its corporate offices in Irving in a move that adds about 650 jobs in North Texas.

GGNSC HOLDINGS - GOLDEN LIVING (2011), a Forbes 200 home health care company, moved its corporate headquarters to Plano from Fort Smith, Arkansas, creating 100 jobs.

ACCENTCARE (2011), one of the largest home health care companies in the country, has moved its corporate headquarters from California to Dallas in a relocation that has created more than 100 jobs.

HMS HOLDINGS CORP. - HEALTH MANAGEMENT SYSTEMS (2010), a health care cost containment company, which already had over 670 workers in Irving, moved its corporate headquarters from New York to Las Colinas, bringing upwards of 350 additional jobs to the region.



Construction Projects

In addition to recurring impacts of operations, health care service providers are engaging in substantial programs of facility expansion adding bed capacity to existing facilities and opening new clinics and hospitals in suburban communities. The projects range from a few hundred thousand dollars for a facility upgrade to the \$1.2 billion "new" Parkland Hospital. While the impacts of construction activities are temporary, meaning that the impacts cease when the construction project is completed, a review of projects across the spectrum of health care service providers in the DFW region shows that multiple projects are usually being built at any given time. Importantly, this means that even in economic downturns, the health care industry is generating jobs and economic activity in the construction trades and related industries. Health care service providers in the DFW region have completed or are planning more than an estimated \$6.6 billion in facility construction projects over the 2005 through 2016 time period.

PUBLIC HOSPITAL



New Parkland Hospital

Cost: Estimated \$1.27 billion

Beds: 862

Estimated Completion: Fall 2014

The nearly 2 million-square-foot Parkland hospital will replace the existing 55-year-old facility, and, when complete, will be the largest public hospital building in the nation built in one phase. The \$1.27 billion project will include a new, 862-bed hospital, as well as a separate clinic building, parking structures, and other support facilities.

Medical City Dallas and Children's Expansion

Location: Dallas

Size: Building 169,795 new square feet, renovating 66,548 square feet for a project total of 236,343 square feet

Cost: \$114 million

Estimated completion: Q4 2015

Hospital expansion and renovation to include four additional floors on Tower E creating 34 more Intensive Care Unit (ICU) beds as well as 46 other medical/surgical patient beds, renovation of 37 private oncology rooms, creation of 18 new private stem cell patient rooms, ED renovations, and surgical services renovation.

Texas Health Presbyterian Hospital Dallas

Location: 8200 Walnut Hill Lane, Dallas

Size: 55,000 square feet

Cost: \$30 million

Estimated completion: June 2013

Renovation of space to accommodate cardiac and general operating rooms and a postanesthesia care unit (PACU). The plan will relocate and construct new space for other departments to make room for the new ORs.



Forest Park Medical Southlake

Location: 421 E. State Highway 114

Size: 1,142,000 sq ft; 54 private inpatient rooms, including 10 VIP suites

Estimated Completion: June 2013

The Southlake location will be the third offering by Forest Park Medical Centers, with current operations in Dallas and Frisco, which offer unique and extraordinary surgical experiences to physicians and patients alike. The physician-owned hospital will offer a wide range of surgical specialties accompanied by a truly luxurious and healing environment. Forest Park also began construction in Fort Worth along the Trinity River within the Clearfork mixed-use development in January 2013.



Methodist Dallas Medical Center

Location: 1441 N. Beckley Ave., Dallas

Size: 248,000 square feet

Cost: \$108 million

Estimated completion: Summer 2014

Expansion includes emergency, critical care, and surgery departments with a new 4-story trauma and critical care center to include 58 new emergency room beds with a shell for two additional stories, 6 trauma suites, 8 surgical suites, and a 36-bed critical care unit.



HCA Medical Center Plano

Location: 3901 West 15th Street, Plano

Size: 56,000 square feet

Cost: \$66 million

Estimated Completion: late 2014

Hospital expansion to keep pace with tertiary referral growth in trauma and critical care to include the addition of 68 beds dedicated to critical and progressive-care patients in the hospital's neurosciences unit, diagnostic testing, administrative services, and other renovations.

ACUTE CARE, GENERAL MEDICINE AND SPECIALITY CARE

ACUTE CARE, GENERAL MEDICINE, AND SPECIALITY CARE



Methodist Richardson Medical Center Bush/Renner

Location: 2831 E. President George Bush Turnpike, Richardson
Size: 266,250 square feet
Cost: \$120 million
Estimated completion: Fall 2014

A new 125-bed acute care hospital at the Methodist Richardson Medical Center Bush/Renner location. The 4-story hospital will open with 125 beds, with shell space for 75 more, and feature a women's pavilion, a Level III neonatal intensive care unit, and labor, delivery and recovery services, plus advanced cardiac care, including catheterization procedures and electrophysiology as well as surgical services, and a radiology department with the latest in imaging technology.

Texas Health Harris Southwest Hospital

Location: 6100 Harris Pkwy, Fort Worth

Size: 90,000 square feet

Cost: \$43.9 million

Estimated completion: First quarter of 2014

Project will include eight new OR's, Surgery Storage, a new PACU & PreOp department, renovation of the 4th floor (24 private patient rooms), a new central sterile department, a new OR waiting area and new admissions department build out.



Texas Health Alliance Hospital

Location: 6100 Harris Pkwy, Fort Worth

Size: 188,000 square feet

Cost: \$90.7 million

Estimated completion: September 2012

A full-service hospital includes a 24-hour emergency room, women and infant services, neonatal intensive care, imaging, physical therapy, surgery, cardiac rehabilitation, occupational health, and wellness programs.



Baylor Medical Center at Waxahachie

Location: Located on 52 acres at the intersection of I-35E and Highway 287, Waxahachie

Cost: \$175.5 Million

Size: 6-story, 299,000-square-foot hospital tower designed to accommodate 124 beds

Estimated Completion: Fall 2014

Having served the citizens of Ellis County for nearly 100 years, Baylor's centennial year will see the building of a brand new hospital with expansion of Women's Services (including Labor & Delivery), General Surgery, Imaging, Neurosciences, Orthopedics, Oncology, Digestive, Cardiovascular, and Emergency Services.



Methodist Charlton Medical Center expansion

Location: 3500 N. Wheatland Road, Dallas

Size: 90,427 square feet [existing space to be placed into use]

Cost: \$27.3 million

Estimated completion: Fall 2012

An expansion and renovation plan to invest \$24.5 million to finish out three patient floor shells, adding 35 new patient care beds, and relocating the postcoronary intervention unit (PCIU) at a cost of \$2.8 million to support expanded cardiology services. The project will increase the hospital's overall operational bed capacity from 269 beds to 294 beds.

HCA North Fort Worth

Location: NE corner of North Tarrant Parkway and I-35

Size: 142,000 square feet

Cost: \$71 million

Estimated Completion: December 2014

A new 30-bed acute care hospital to offer emergency services, surgical services, women's services, cardiac services including a cath lab, imaging, endoscopy, a medical/surgical unit, and an intensive care unit with an additional shelled floor for future expansion.



Grapevine Patient Tower at Baylor Regional Medical Center at Grapevine

Location: Baylor Regional Medical Center at Grapevine 1650 W. College St., Grapevine

Cost: \$87 Million

Estimated Completion: Spring 2013

The Grapevine Tower is a multi-phased renovation and new hospital tower project that will add capacity for 108 hospital beds, allowing for future expansion of ICU, emergency department, and operating rooms.



Texas Health Harris Methodist Hospital Fort Worth

Location: 1301 Pennsylvania Ave., Fort Worth

Size: 116,000 square feet

Cost: \$57 million

Estimated completion: End of 2013

The expansion project will include the building of a new emergency department, clinic, and central sterile department.

RESEARCH AND EDUCATION



William P. Clements Jr. University Hospital

Cost: \$800 million

Beds: 460 bed tertiary-care hospital

Estimated Completion: Late 2014

The state-of-the-art facility is on a 32-acre site of UTSW's South Campus and will replace the aging University Hospital-St. Paul which opened in 1964.

UT Southwestern Clinical Centers Phase 2

Cost: \$6.5 million

Estimated Completion: Fall 2013

UT Southwestern Medical Center opened new clinical centers in Richardson/Plano and Park Cities. The Richardson/Plano center will expand by 26,500 square feet.

PROTON THERAPY

Advance Particle Therapy Center at UT Southwestern Medical Center

Location: East of I 35E, south of Medical District Drive

Cost: \$220 million

Size: 108,000 square feet

Estimated Completion: 2017

Owned and funded by Advanced Particle Therapy, the center would be operated by UTSW physicians and staff, pending UT System approval.

Texas Center for Proton Therapy, by Texas Oncology, affiliated with The US Oncology Network supported by McKesson SpecialtyHealth

Location: 1501 West Royal Lane, in Irving, Las Colinas

Cost: \$105 million

Size: 50,000 square feet

Estimated Completion: 2015

The Proton Therapy Cancer Treatment Center will give patients in Texas and across the country advanced options in the fight against cancer, with this sophisticated form of radiation treatment that is particularly effective in treating certain pediatric and adult cancers, often with fewer side effects.

Major Companies

The scope of the health care industry in Dallas-Fort Worth is large and diverse. It ranges from large hospital management companies to basic health service providers and physicians. Also included are advanced life sciences research, public and non-profit organizations, medical manufacturing companies, and speciality care services. DFW is home to over 100 major health care related headquarters. In all, these companies employ over 280,000 people, making it one of the largest employment sectors in the region.

Public Sector, Education, & Non-Profits in Health Care

American Cancer Association
 American Lung Association
 American Heart Association
 Dallas-Fort Worth Business Group on Health
 Dallas County Medical Society
 County Community College Districts (various counties)
 DFW Hospital Council
 County Health Departments (various counties)
 Mental Health Mental Retardation Centers (various counties)
 Easter Seals North Texas
 John Peter Smith Hospital
 Parkland Hospital
 Parker University
 Recovery Resource Council
 Health Industry Council
 Texas A&M Health Science Center
 Baylor College of Dentistry
 United Service Association For Health Care
 University of Texas at Arlington
 University of Texas at Dallas
 University of North Texas
 UNT Health Science Center at Fort Worth
 Texas Tech University School of Pharmacy
 Texas Christian University
 Texas Department of Aging & Disability Services
 Texas Woman's University
 UT Southwestern at Dallas
 Veterans Health Administration

Major Company Operations Serving the Community's Health Care Needs

Dallas-Fort Worth has over 100 major health care industry management companies, with combined revenues in excess of \$40 billion. Below are just a sample of the many companies that operate here.

Administration of Health Care Services

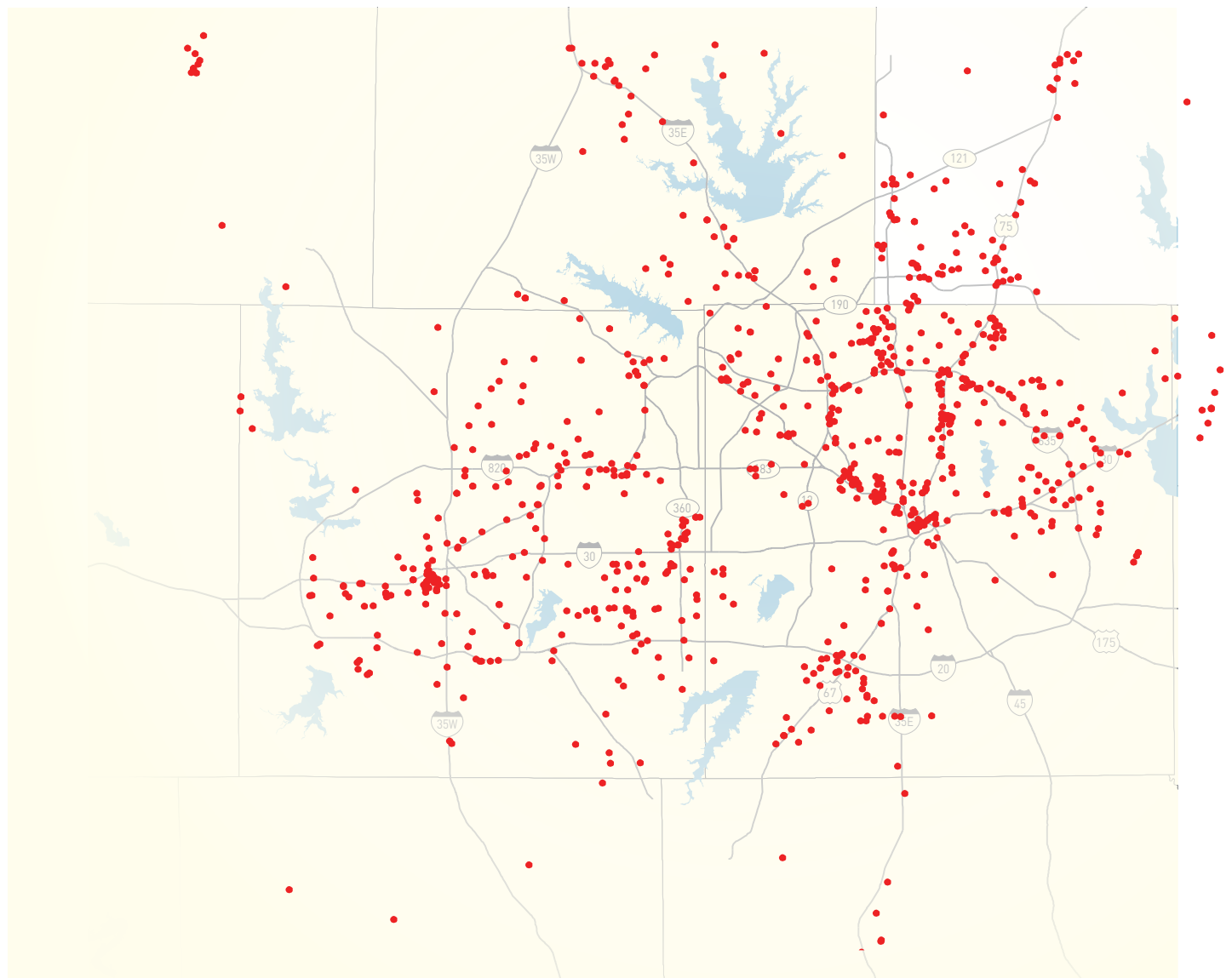
Baylor Scott and White Health
 Cirrus Health
 Children's Medical Center
 Christus Health System
 Concentra, Inc.
 Cook Children's
 Community Hospital Corporation
 HCA North Texas Healthcare
 HMS Holdings
 Home Care Services
 Horizon Health Corporation
 Kindred Healthcare
 Legacy Hospitals
 Lifepoint Hospitals, Inc.
 Methodist Health System
 Odyssey Healthcare, Inc.
 Outreach Health Services
 Rockwall Hospitals Inc.
 Scottish Rite Hospital
 Texas Back Institute
 Texas Spine & Joint Hospital
 Texas Hospital for Advanced Medicine
 Tenet Healthcare Corporation
 Texas Health Resources

Hospital and Medical Service Plans

Aetna
 Amerigroup Community Care
 Ameriplanusa
 Anthem Insurance Companies, Inc.
 Aramark Healthcare
 Blue Cross Blue Shield of Texas
 Bravo Health, Inc.
 Careington International, Inc.
 CHRISTUS Health
 Cigna Healthcare of Texas, Inc.
 Galaxy Health Network
 Hailstone Insurance Group
 HealthMarket
 Homeland Healthcare Inc.
 Humana Inc.
 Metro-West
 Mid-West National Life Insurance Company of Tennessee
 One Health Plan of Texas, Inc.
 PacificCare
 Parkland Community
 Prhc-Ennis, L.P.
 Torchmark Corporation
 Trailblazer Health Enterprises LLC
 United Healthcare
 Wellpoint

Services

22 Acquisition Corp	Bellaire Surgicare	CVS Caremark
A One Plus Home	At Oakmont	Dallas Life Support Systems, Incorporated
Health Agency Inc.	Brentwood Health Care	Dallas Metrocare Services
Admiral Linen	The Beryl Companies	The Delta Companies
Uniform Service	Capital Senior Living Corporation	Diagnostic Health Services, Inc.
American Physician Housecalls	Carter Bloodcare	D&S Residential Service Inc.
Angmar Medical Holdings Inc.	Centre For Neuro Skills, Inc.	EmCare Holdings Inc.
Aramark Healthcare	Child Study Center	Examination Management Services, Inc.
Arbrook Plaza Nursing Rehabilitation	Claimsnet Com Inc.	Golden Living
Autistic Treatment Center Inc.	CPR Institute Inc.	HealthSpring Life & Health
Axxess Technology Solutions	Conifer Health Solutions	Home Care Management Inc.
	Cooper Institute	
	Crest Services	



Telesis Management Corporation
 Teleflex Medical Inc.
 The Visiting Nurse
 Association of Texas
 Trans Healthcare Inc.
 Triple A Medical Inc.
 UNT Health Patient Services
 US Oncology, Inc.
 Vitas Health Care
 Viverae, LLC
 Voyager Hospicecare, Inc.
 Worldwide Health Services

Wages and Salaries

Median wages and salaries in the Dallas–Fort Worth region generally track below national levels, thanks to Texas’ pro-business labor environment and low taxes. An abundance of affordable housing compared to major metropolitan areas means employees can still enjoy a high standard of living at lower costs than in other major markets.

What Health Care Workers in DFW Earn



PHYSICIANS AND SURGEONS

\$195,000 | DFW ANNUAL MEAN
\$93.75 | DFW HOURLY MEAN



PHYSICAL THERAPISTS

\$86,445 | DFW ANNUAL MEDIAN
\$41.56 | DFW HOURLY MEDIAN



OCCUPATIONAL HEALTH AND SAFETY SPECIALISTS

\$66,019 | DFW ANNUAL MEDIAN
\$31.74 | DFW HOURLY MEDIAN



DENTISTS

\$178,776 | DFW ANNUAL MEDIAN
\$85.95 | DFW HOURLY MEDIAN



OCCUPATIONAL THERAPISTS

\$86,237 | DFW ANNUAL MEDIAN
\$41.46 | DFW HOURLY MEDIAN



RADIOLOGIC TECHNOLOGISTS AND TECHNICIANS

\$61,589 | DFW ANNUAL MEDIAN
\$29.61 | DFW HOURLY MEDIAN



SURGEONS

\$191,339 | DFW ANNUAL MEDIAN
\$91.99 | DFW HOURLY MEDIAN



DENTAL HYGIENISTS

\$74,464 | DFW ANNUAL MEDIAN
\$35.80 | DFW HOURLY MEDIAN



MEDICAL AND CLINICAL LABORATORY TECHNOLOGISTS

\$56,805 | DFW ANNUAL MEDIAN
\$27.31 | DFW HOURLY MEDIAN



PEDIATRICIANS

\$164,798 | DFW ANNUAL MEDIAN
\$79.23 | DFW HOURLY MEDIAN



CHEMISTS

\$52,250 | DFW ANNUAL MEDIAN
\$25.12 | DFW HOURLY MEDIAN



RESPIRATORY THERAPISTS

\$55,058 | DFW ANNUAL MEDIAN
\$26.47 | DFW HOURLY MEDIAN



PHARMACISTS

\$114,941 | DFW ANNUAL MEDIAN
\$55.26 | DFW HOURLY MEDIAN



REGISTERED NURSES

\$68,578 | DFW ANNUAL MEDIAN
\$32.97 | DFW HOURLY MEDIAN



LICENSED PRACTICAL AND LICENSED VOCATIONAL NURSES

\$45,781 | DFW ANNUAL MEDIAN
\$22.01 | DFW HOURLY MEDIAN



CHEMICAL TECHNICIANS
\$36,941 | DFW ANNUAL MEDIAN
\$17.76 | DFW HOURLY MEDIAN



DENTAL ASSISTANTS
\$34,528 | DFW ANNUAL MEDIAN
\$16.60 | DFW HOURLY MEDIAN



TECHNICIAN, PHARMACY
\$33,093 | DFW ANNUAL MEDIAN
\$15.91 | DFW HOURLY MEDIAN



OPTICIANS, DISPENSING
\$32,365 | DFW ANNUAL MEDIAN
\$15.56 | DFW HOURLY MEDIAN



MASSAGE THERAPISTS
\$27,997 | DFW ANNUAL MEDIAN
\$13.46 | DFW HOURLY MEDIAN



**HEALTH TECHNOLOGISTS
AND TECHNICIANS**
\$42,162 | DFW ANNUAL MEDIAN
\$20.27 | DFW HOURLY MEDIAN



**HEALTHCARE
SUPPORT WORKERS**
\$31,741 | DFW ANNUAL MEDIAN
\$15.26 | DFW HOURLY MEDIAN



**NURSING AIDES,
ORDERLIES, AND
ATTENDANTS**
\$23,629 | DFW ANNUAL MEDIAN
\$11.36 | DFW HOURLY MEDIAN



**SURGICAL
TECHNOLOGISTS**
\$42,390 | DFW ANNUAL MEDIAN
\$20.38 | DFW HOURLY MEDIAN



**MEDICAL RECORDS AND
HEALTH INFORMATION
TECHNICIAN**
\$33,301 | DFW ANNUAL MEDIAN
\$16.01 | DFW HOURLY MEDIAN



**EMERGENCY MEDICAL
TECHNICIAN AND
PARAMEDIC**
\$31,470 | DFW ANNUAL MEDIAN
\$15.13 | DFW HOURLY MEDIAN



HOME HEALTH AIDES
\$20,634 | DFW ANNUAL MEDIAN
\$9.92 | DFW HOURLY MEDIAN



**MEDICAL
TRANSCRIPTIONISTS**
\$36,026 | DFW ANNUAL MEDIAN
\$17.32 | DFW HOURLY MEDIAN



**MEDICAL TECHNICIAN,
LABORATORY**
\$34,278 | DFW ANNUAL MEDIAN
\$16.48 | DFW HOURLY MEDIAN



MEDICAL ASSISTANTS
\$30,306 | DFW ANNUAL MEDIAN
\$14.57 | DFW HOURLY MEDIAN



**PSYCHIATRIC
TECHNICIANS**
\$18,325 | DFW ANNUAL MEDIAN
\$8.81 | DFW HOURLY MEDIAN



**LIFE, PHYSICAL,
AND SOCIAL SCIENCE
TECHNICIANS**
\$50,440 | DFW ANNUAL MEDIAN
\$24.25 | DFW HOURLY MEDIAN



**SPEECH-LANGUAGE
PATHOLOGISTS**
\$66,290 | DFW ANNUAL MEDIAN
\$31.87 | DFW HOURLY MEDIAN



PHYSICIAN ASSISTANTS
\$96,595 | DFW ANNUAL MEDIAN
\$46.44 | DFW HOURLY MEDIAN

Education

The Dallas–Fort Worth region offers a variety of public and private schools, with robust programming in health care related services, biosciences, and research. Many of these schools are nationally recognized for the highest levels of innovation and academic excellence and boast countless clinical breakthroughs and innovations. The need for a well educated health industry workforce is vital to the long term economic success of the region.

COMMUNITY COLLEGES

Area community colleges, including those in Dallas, Collin, Denton, and Tarrant Counties educate and train a large number of the region's health care industry workers. These schools offer a variety of Associate Degree and certificates, including:

Biology
Biotechnology
Child Development
Dental Hygiene
Diagnostic Medical Sonography
Echocardiology Technology
Emergency Medical Services (EMS) and Paramedic
Health Information Management
Invasive Cardiovascular Technology
Magnetic Resonance Imaging (MRI)
Medical Assisting
Medical Front Office
Medical Laboratory Technology
Medical Staff Services
Nursing
Pharmacy Technician
Psychology
Radiologic Sciences
Respiratory Care
Social Work
Substance Abuse Counseling
Surgical Technology

Enrollment: 3,983

The University of North Texas has numerous health related programs and majors preparing students for careers in the health industry. Among those are programs in biology, speech and hearing, chemistry, health psychology and behavioral medicine, kinesiology, and a nationally recognized program in health informatics.

University of North Texas

Texas Woman's University

Enrollment: 1,579

The UNT Health Science Center is a 33 acre graduate school located in Fort Worth's Cultural District. The campus includes the Texas College of Osteopathic Medicine, the Graduate School of Biomedical Sciences, the School of Public Health and the School of Health Professions, which includes the departments of Physician Assistant Studies and Physical Therapy. A new System School of Pharmacy will open in fall 2013. The school has been ranked in U.S. News and World Report's Top 50 Medical Schools in Primary Care education for nine consecutive years.

Enrollment: 6,631

The University of Texas at Arlington College of Nursing is ranked in the top 15 largest schools of nursing in the United States. The school has programs that offer students a Bachelors of Science in Nursing (A four year program leading to RN Licensure), RN to a Bachelors in Nursing, Masters of Science in Nursing, Doctorate of Nursing Practice and PhD's. Annually 95% of Bachelors of Science in Nursing graduates remain in the Dallas-Fort Worth area as new RNs. RNs who have Associate Degrees in Nursing also have various training opportunities in the school that provide for advancement in both acute care and community settings.

Texas Wesleyan University

Enrollment: 765

In addition to undergraduate degree programs in Biology, Biology with a Life Science Certification, Psychology, Chemistry, and Biochemistry, Texas Wesleyan has Masters programs in Counseling and Masters and Doctoral programs in Nurse Anesthesia.

University of North Texas Health Science Center

Texas Christian University

University of Texas at Arlington

Enrollment: 1,335

The Harris College of Nursing and Health Sciences houses schools for Nursing, Social Work, Communication Sciences and Disorders, Kinesiology and Nurse Anesthesia, and is home to more than 1,200 undergraduate students, 300 graduate students, 80 full-time faculty, 24 staff, and numerous part-time field and clinical faculty. TCU's Pre-Health Professions program prepares students for entry into medical, dental, veterinary, pharmacy and optometry schools. The program boasts an 80 percent acceptance rate into medical school and has a distinguished, 100-year history. A Health Professions Advisory Committee, currently consisting of 12 faculty members, teaches many of the courses taken by pre-health students, and also provides academic advising, mock professional school interviews and a letter of recommendation for all students.

Enrollment 1,446

Texas Woman's University is among the nation's leading providers of nurses and other health care professionals. The TWU T. Boone Pickens Institute of Health Sciences-Dallas Center, which opened in February 2011 in the heart of the Southwestern Medical District, combines TWU's nationally recognized programs in nursing, occupational therapy and physical therapy, the TWU Stroke Center and the health systems management program in one location, emphasizing a team approach to patient care. TWU also offers innovative online degree programs in nursing and other health-related fields.

University of Dallas**Enrollment: 267**

University of Dallas students are enrolled in undergraduate degree programs in biology and biochemistry, as well as undergraduate and graduate degree programs in psychology. The university also offers a biology/nursing dual degree program in conjunction with Texas Woman's University, and pre-health programs related to a variety of health professions.

Parker University**Enrollment: 878**

Parker University is a private, non-profit, university offering allied health programs to meet the growing demand for health care professionals. According to the U.S. Bureau of Labor Statistics, the U.S. will create 5.6 million new health care jobs by 2020, most of which will be high-paying and require post-secondary education. Preparing students for health care careers, Parker University offers the following degrees: Doctorate of Chiropractic, an online Master of Business Administration with a concentration in Health Care Management, an online Bachelor of Science with a major in Health Information Management, Bachelor of Science with a major in Anatomy, Bachelor of Science with a major in Health and Wellness, Associate of Applied Science with a major in Radiologic Technology, and Massage Therapy certificates. The university plans to develop nine additional health care related programs through 2017.

School of Health Professions. These three schools train nearly 4,400 medical, graduate and health professions students, residents and postdoctoral fellows each year. Faculty at UT Southwestern include 4 Nobel Prize winning scientists, one winner of the Shaw Prize, 18 members of the National Academy of Sciences, 14 members of the American Academy of Arts and Sciences and 13 members of the Howard Hughes Medical Institute. UT Southwestern Medical School admits about 230 students each year, and admission is highly competitive. The Graduate School of Biomedical Sciences encompasses the Division of Basic Science, the Division of Applied Science, and the Division of Clinical Science and offers master and doctoral degrees across various disciplines. The UT Southwestern School of Health Professions offer Doctorate Degrees in Physical Therapy, Master's Degrees in Biomedical Communications, Biomedical Illustration, Clinical Nutrition, Prosthetics-Orthotics, Physician Assistant Studies, Rehabilitation Counseling, and Bachelor's Degrees in Medical Laboratory Sciences and Radiation Therapy.

University of North Texas at Dallas

Dallas-Fort Worth

Health Industry Related Higher Education Programs by Size of Enrollment

University of Texas at Dallas**Enrollment 5,378**

The University of Texas at Dallas offers programs in Behavioral and Brain Sciences, Natural Science and Math, Healthcare Studies, Healthcare Management and Bioengineering. The health care studies program is designed for students of any major who are interested in pursuing a career in a health care-related field. The Master of Science in health care management prepares students with a solid foundation in business analysis and decision-making, an exposure to health care management and professional development opportunities. The School of Behavioral and Brain Sciences activities are built around four centers, the Callier Center for Communication Disorders, the Center for Children and Families, the Center for BrainHealth and the Center for Vital Longevity. UT Dallas' biomedical engineering program provides a foundation in mathematics, chemistry and biology before students advance to courses in physiology, biomechanics, electronics and instrumentation.

Enrollment: 108

The TTUHSC's Doctor of Pharmacy program has facilities located at both the North Texas Veterans Administration Medical Center and within the central Dallas Medical District. More than 80 third- and fourth-year pharmacy students and up to 20 postgraduate practice and specialty pharmacy residents receive their education and training in DFW.

University of Texas Southwestern Medical Center**Enrollment: 2,467**

Part of The University of Texas System, UT Southwestern medical center includes three degree-granting institutions: UT Southwestern Medical School, UT Southwestern Graduate School of Biomedical Sciences and UT Southwestern

Texas Tech School of Pharmacy**Southern Methodist University****Enrollment: 386**

SMU offers degree programs ranging from anthropology, social and behavioral sciences, biochemistry, as well as a degree in Applied Physiology and Sport Management.

Baylor College of Dentistry**Baylor School of Nursing****Enrollment: 568**

The Texas A&M Health Science Center Baylor College of Dentistry programs include a Bachelors in Dental Hygiene and a Doctorate in Dental Surgery. Nearly one-third of all dentists in Texas are HSC-BCD graduates. The college also graduates the largest number of dental hygienists with bachelor's degrees in the state.

Enrollment: 408

Baylor University Louise Herrington School of Nursing offers a traditional (4 year) and an accelerated post-baccalaureate (12 months) Bachelor of Science in Nursing degree, and three advanced practice majors: Family Nurse Practitioner, Neonatal Nurse Practitioner and Nurse Midwifery. Baylor's mission is to prepare Baccalaureate and Graduate Level nurses, within a Christian community, for professional practice, health care leadership, and service to society.

Enrollment: 237

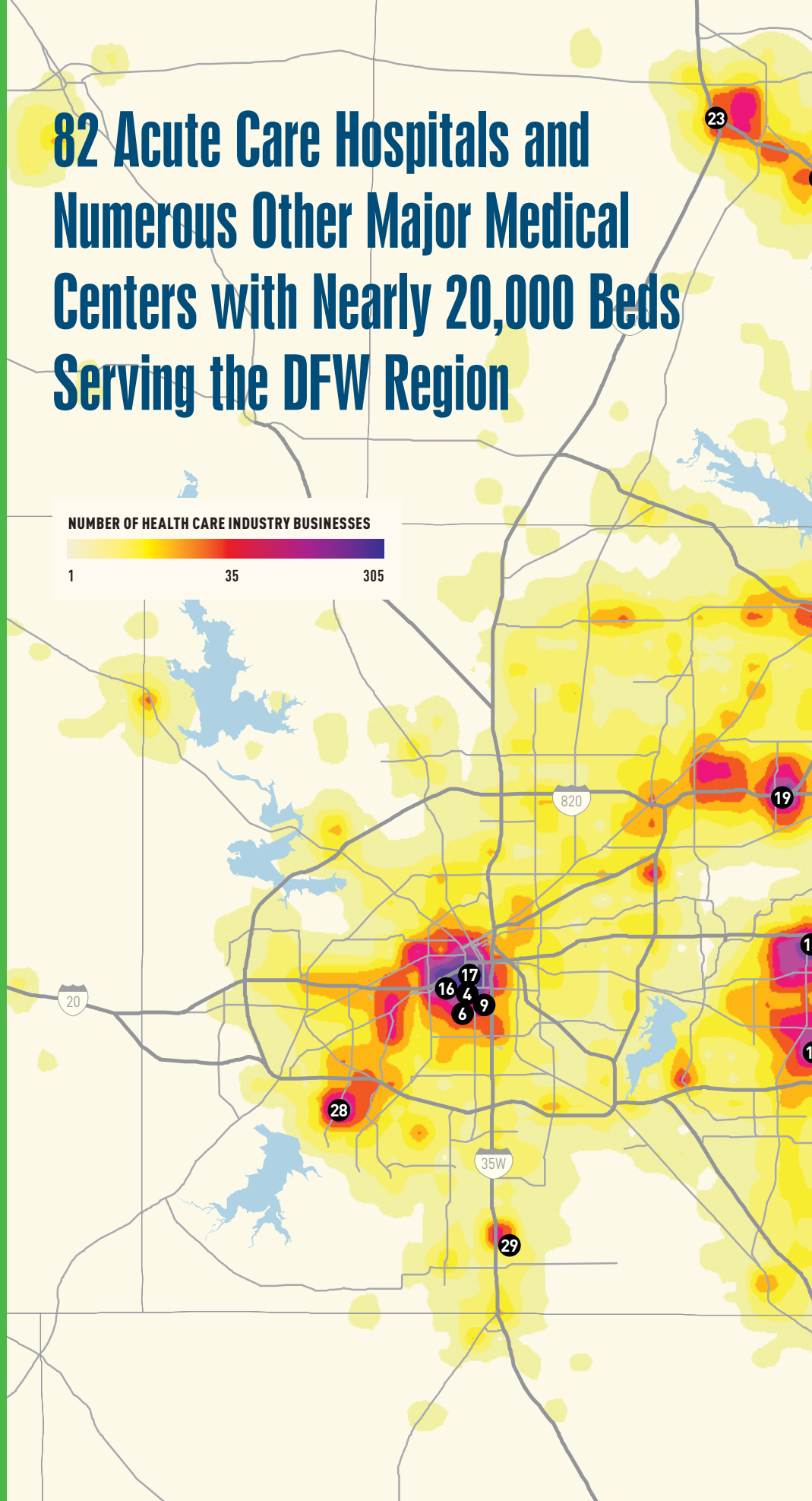
The UNT-Dallas has several degree programs geared toward careers in the health industry, including a Bachelors in Health Information Management program, Human Services Management & Leadership, Sociology, and a Master of Education in Counseling.

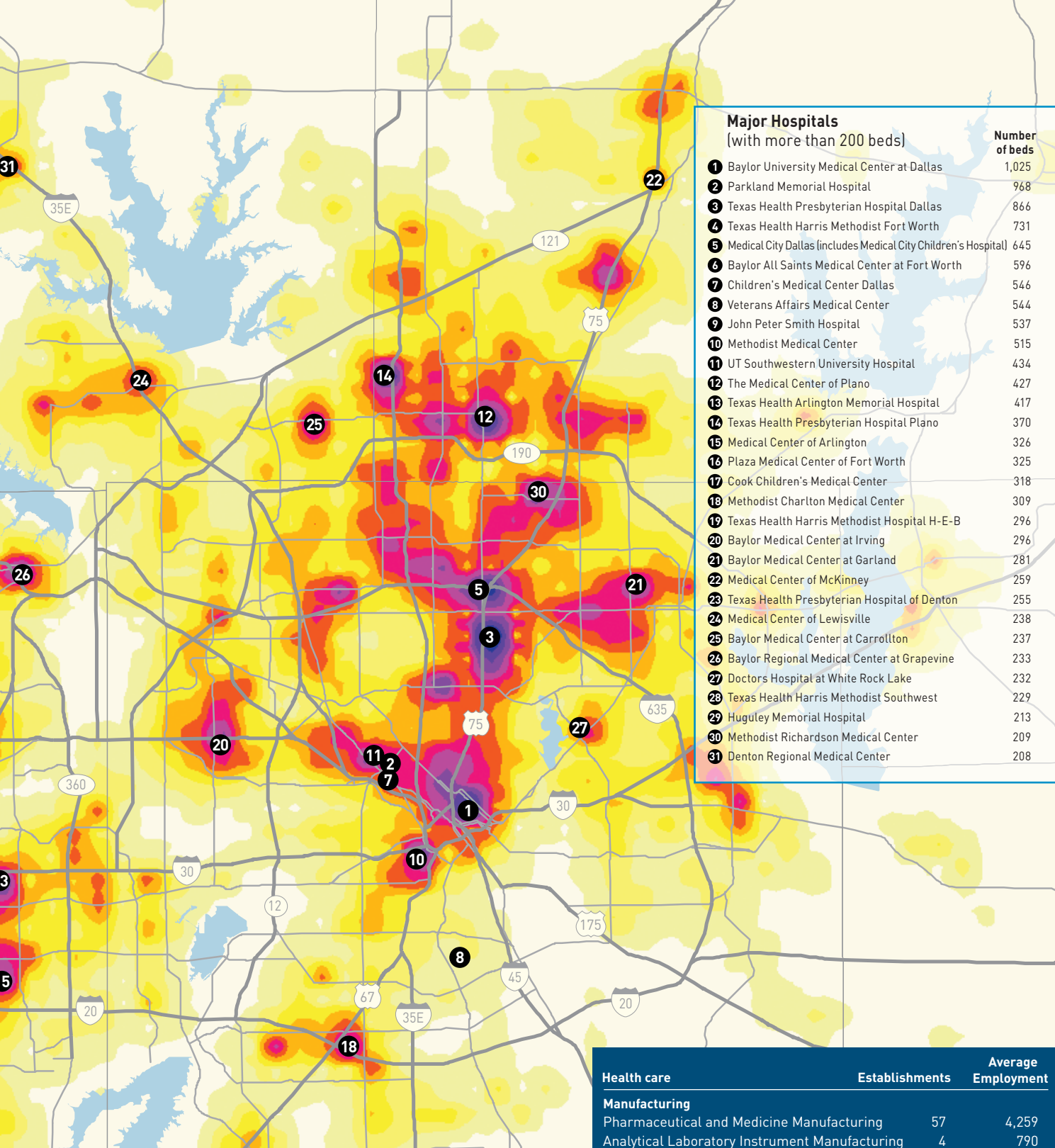
Health Care Industry Clusters

Health industry companies are located throughout the Dallas–Fort Worth region, making it easy for them to tap into a broad base of skilled employees. The health care industry in DFW is more than health care services, it is manufacturing, research, and goods distribution. The activities often cluster around each creating a synergy within the health care community.

82 Acute Care Hospitals and Numerous Other Major Medical Centers with Nearly 20,000 Beds Serving the DFW Region

NUMBER OF HEALTH CARE INDUSTRY BUSINESSES





Health care	Establishments	Average Employment
Services		
Health Care and Social Assistance	15,572	360,414
Home Health Equipment Rental	38	760
Pharmacies and Drug Stores	860	10,346
Other Health and Personal Care Stores	415	4,064
Optical Goods Stores	222	1,268
Research & Development in Biotechnology	64	1,146
Government		
Administration of Public Health Programs	56	2,998

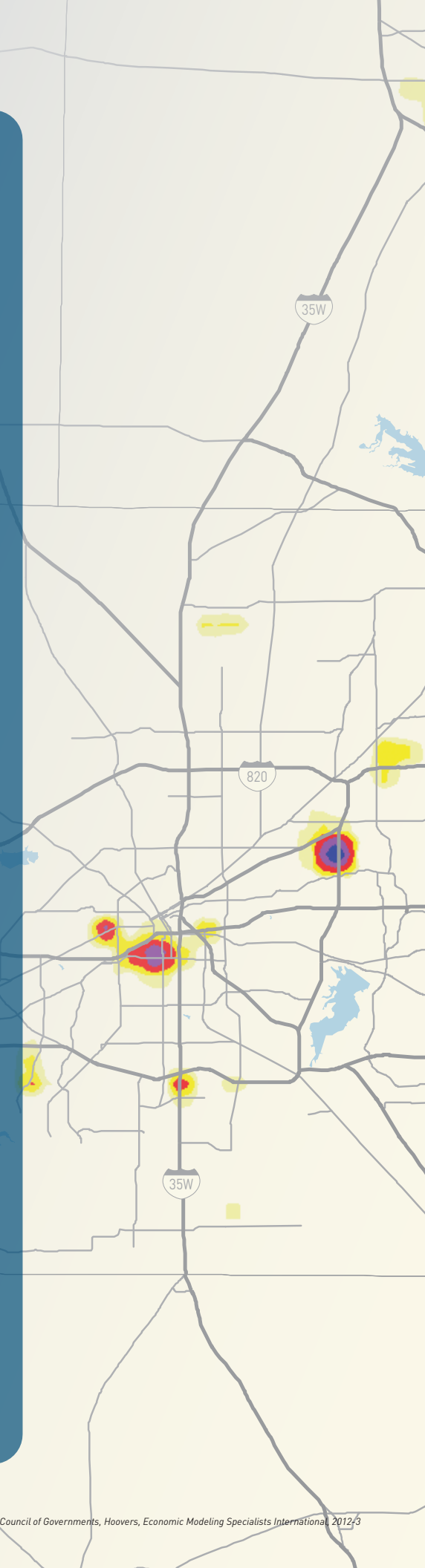
Health care	Establishments	Average Employment
Manufacturing		
Pharmaceutical and Medicine Manufacturing	57	4,259
Analytical Laboratory Instrument Manufacturing	4	790
Irradiation Apparatus Manufacturing	4	23
Medical Equipment and Supplies Manufacturing	238	5,278
Wholesale Trade		
Wholesale Distribution of Medical, Dental, Hospital Equipment and Supplies	372	5,063
Wholesale Distribution of Drugs, Drug Proprietaries and Druggist' Sundries	283	7,292
Ophthalmic Goods Merchant Wholesalers	30	1,216
Insurance		
Direct Health and Medical Insurance Carriers	73	8,287
Health and Welfare Funds	10	1,015

Life Sciences Industry Clusters

More than 900 firms employing over 23,000 people make up the life sciences industry in the Dallas–Fort Worth region. DFW’s life sciences industry is dominated by pharmaceutical and medicine manufacturers, such as Alcon Inc. and Essilor of America Inc. Medical equipment and supplies, scientific research and development, and innovation are hallmarks of DFW’s life sciences industry. UT Southwestern Medical Center in Dallas is among the nation’s best in biology and biochemistry research, boasting countless clinical breakthroughs and innovations.

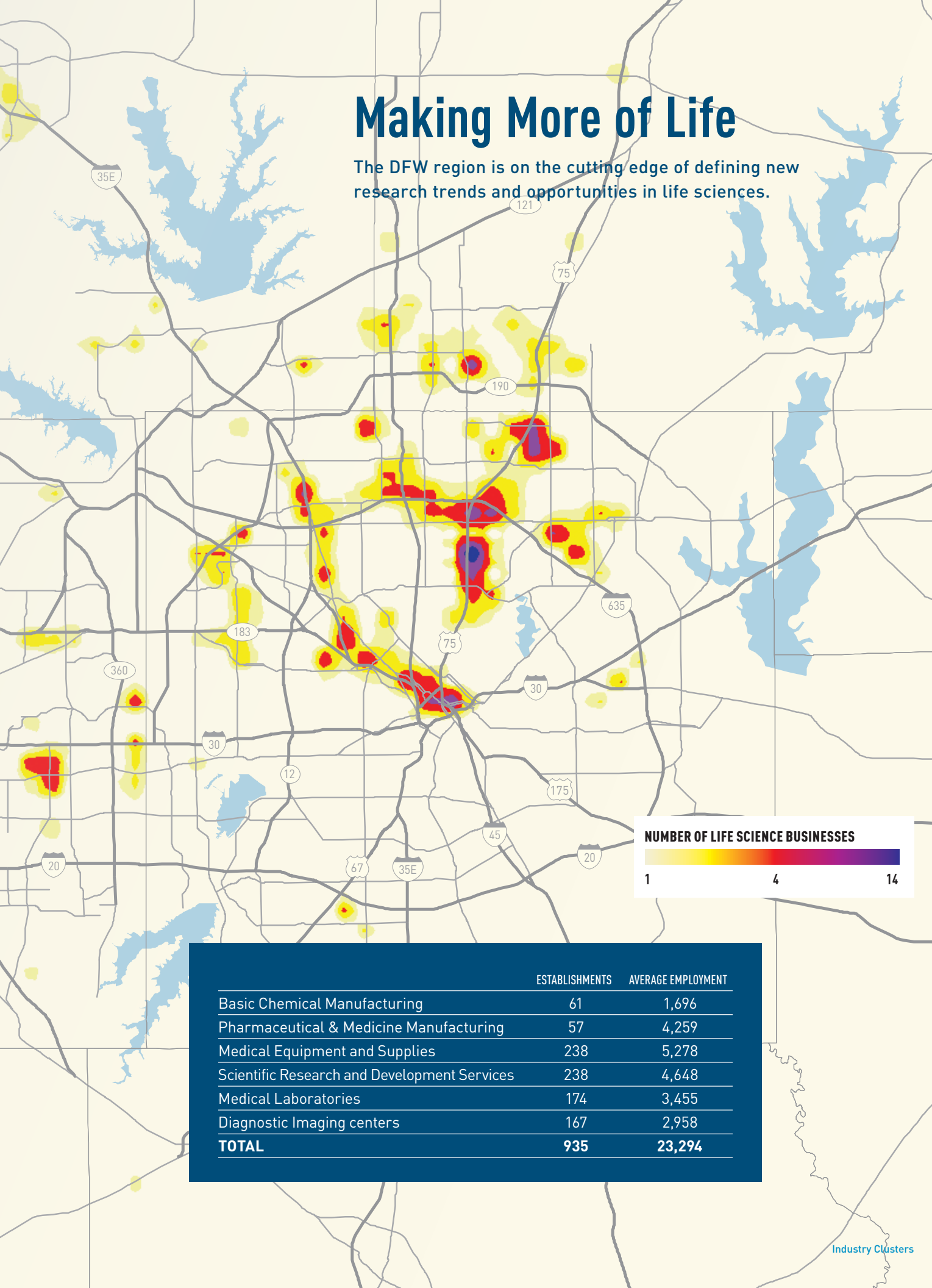
Sample of the Life Science Companies in DFW

Abbott Laboratories
Access Pharmaceuticals Inc.
Alcon
AmerisourceBergen Drug Corporation
Atrion Corporation
Avail Medical Products, Inc.
Bledsoe Brace Systems
Brady Precision Converting, LLC
Cardinal Health 200, Inc.
Caris Diagnostics, Inc.
Dallas Pathology Associates Inc.
DFB Pharmaceuticals
Essilor of America
Galderma Laboratories L.P.
GlaxoSmithKline
Hanger Orthopedic Group, Inc.
Hanger Prosthetics & Orthotics, Inc.
Healthpoint, Ltd.
Humanetics II
International, Inc.
Kendall Healthcare Products
Kimberly-Clark Corporation
MacuClear
Med Fusion, LLC
Medtronic Mitas Rex
Mentor Texas L.P.
MicroTransponder Diagtronix, Inc.
Middlebrook Pharmaceuticals Inc.
Mobile Diagnostic Systems
MRI Medical Inc.
Natural Like Dental Inc.
NCH Corporation-Chemsearch Division
Nurse Assist, Inc.
Omni Hearing Systems
OraMetrix Inc.
Orchid Cellmark Inc.
Orthofix
Osteomed L.P.
Oxysure Systems, Incorporated
Pathologists Bio Medical Lab
Prestige Ameritech, Ltd.
Professional Clinical Laboratory, Inc.
Quest Diagnostics Incorporated
Quest Medical Inc.
RBC Life Sciences Inc.
Reata Pharmaceuticals
Retractable Technologies, Inc.
Royal Baths Manufacturing Co Inc.
St. Jude Medical
Stryker Imaging Corporation
Technologies, LLC
Texas Pharmaceutical Research, L.P.
Texel Industries
United Surgical Partners



Making More of Life

The DFW region is on the cutting edge of defining new research trends and opportunities in life sciences.



	ESTABLISHMENTS	AVERAGE EMPLOYMENT
Basic Chemical Manufacturing	61	1,696
Pharmaceutical & Medicine Manufacturing	57	4,259
Medical Equipment and Supplies	238	5,278
Scientific Research and Development Services	238	4,648
Medical Laboratories	174	3,455
Diagnostic Imaging centers	167	2,958
TOTAL	935	23,294

Core Strengths

Diversity is our strength in health care. Many areas of the country pride themselves on being the top location for medical care. The Dallas-Fort Worth region is unique in that you can find superior health care in a variety of areas. As a result, the newfound opportunities in the space in between traditional care are being founded right here in DFW. And a few stand out from the crowd are at the core of our regions health care DNA.

UT SOUTHWESTERN

UT Southwestern Medical Center ranks among the top academic medical centers in the world.

- Trains nearly 4,600 medical, graduate and allied health students, residents, and postdoctoral fellows each year
- Employs around 11,400 employees and an operating budget of nearly \$1.79 billion
- One of eight medical schools in Texas
- Ph.D. programs are offered in 10 areas: Biological Chemistry, Cancer Biology, Cell Regulation, Genetics, and Development, Immunology, Integrative Biology, Molecular

CHILDREN'S CARE

- The Texas Scottish Rite Hospital Spinal System developed in the 1980s, modified in 2005, and manufactured and marketed by Medtronic, is the most widely used implant system in the world for spinal deformity.
- Children's Medical Center Dallas is one of only 14 national pediatric research centers sanctioned by the National Institutes of Health
- Children's Medical Center Dallas-Texas Scottish Rite Hospital ranked #1 in the country for Pediatric Orthopedics by U.S. News and World Report in 2013

BRAIN RESEARCH, NEUROLOGY & NEUROSURGERY

Institutes and Centers focused on Brain research in DFW:

- UNT Health Science Center Institute for Aging and Alzheimer's Disease
- UTA Center of Excellence for the Study of Health & Chronic Illness
- UTA Medical Imaging & Device Innovation Center
- UTA Nanotechnology Research & Education Center
- UTD Center for Brain Health
- UTD Center for Vital Longevity
- UT Southwestern Alzheimer's Disease Center
- UT Southwestern (#18) and Baylor University Medical Center (#36) are leaders in neurology and neurosurgery as ranked by 2013 U.S. News & World Report

THRIVING INDUSTRY

- Many major health care related companies have headquarters or significant operations within DFW, including two Fortune 500 companies Tenet and Kimberly-Clark.
- Eye Care Products Manufacturing - DFW is home to a large number of ophthalmic goods manufacturers that produce eye care devices and medical supplies including Alcon, DAC vision, Essilor, Hoya, Atrion, and TruForm
- Medical Device & Supplies Manufacturing - A strong cluster of companies located in DFW, including Abbott Laboratories, Ferris Manufacturing, Flextronics, Greatbatch, Stryker, and St. Jude Medical
- Emerging healthcare software application development industry in DFW, drawing on a large labor pool of talented designers and programmers

Biophysics, Molecular Microbiology, Neuroscience, and Biomedical Engineering (a joint program with UT Arlington)

- Six Nobel Prize recipients since 1985
- 20 members of the National Academy of Sciences
- The Harold C. Simmons Cancer Center has National Cancer Institute (NCI) designation, an elite distinction held by only the top-tier cancer centers nationwide
- Since 2007, has received over \$1 billion in National Institutes of Health (NIH) funding
- Parkland and UT Southwestern. Parkland's Level I Trauma Center and Burn Center are internationally recognized

REGIONAL PARTNERSHIPS

A collaborative spirit that exists among major participants/competitors in the sector. Examples include the DFW Hospital Council, Health Industry Council, Dallas Medical Resources, and the Teaching Hospital Forum.

- Developing regional data initiatives regarding patient safety and patient outcomes.
- The North Texas Accountable Healthcare Partnership (NTAHP) is a non-profit, multi-stakeholder organization designated as the health information exchange (HIE) entity in North Texas.
- Health care community businesses work together on legislative issues that matter

CANCER RESEARCH

Cancer Care and Research is a cornerstone of the Dallas region's strengths in healthcare.

- CPRIT – The Cancer Prevention & Research Institute of Texas goal is to expedite innovation and commercialization in the area of cancer research and to enhance access to evidence-based prevention programs and services throughout Texas. Over \$230 million granted to institutions in DFW since 2009
- Proton Therapy Centers – Two highly innovative cancer treatment facilities are under construction in DFW. Only eleven proton therapy centers currently in the entire U.S
- Mary Crowley Cancer Research Centers located at Medical City Dallas Hospital is one of the world's largest gene therapy investigative facilities
- UT Southwestern Harold C. Simmons Cancer Center National Cancer Institute (NCI) designated
- Baylor T. Boone Pickens Cancer Hospital is the first dedicated cancer hospital in North Texas and only the second in the state

DENTAL RESEARCH

- Texas A&M Baylor College of Dentistry (TAMBCD) is a nationally recognized center for oral health sciences education, research, specialized patient care, and continuing dental education

WELLNESS

- Cooper Institute and Clinic - The Cooper Center Longitudinal Study is one of the most highly referenced databases on physical fitness and health in the world

SPECIALTY CARE AND RESEARCH

Every kind of care can be found in the DFW Region, but a few stand out among the crowd:

- Cancer care and research
- Children's care
- Brain research, neurology & neurosurgery
- Dental research
- Wellness

RESEARCH

CANCER RESEARCH
NEUROSURGERY
THRIVING INDUSTRY

REGIONAL PARTNERSHIPS

BRAIN RESEARCH
WELLNESS
DENTAL RESEARCH

Accelerators and Incubators

Bolstering the vibrant corporate climate of the DFW region are various technology incubators that provide support to growing companies. Incubators and accelerators serve to strengthen the foundation of young businesses in this competitive market. Many of the regions incubators specifically focus on health care industry products, while others are diverse in their activities. All help early-stage businesses in North Texas develop innovative products that will may someday have a significant impact on this regions economy.

AFFORDABLE WORK SPACES

The DFW area has a number of affordable office and coworking spaces available for entrepreneurs, freelancers and startups.

Atrium Executive Business Centers - DFW

Dallas Cowork - Farmers Branch

The Common Desk - Deep Ellum

The Weld - Design District

The Hive - Oak Cliff

SpryRocket - Lower Greenville

XL Executive Lounge - Knox/Henderson

coLAB Workspace - Fort Worth

Connective Hub - Dallas

Regus - DFW

Dallas Fort Work - North Dallas

Dallas Makerspace - Dallas

Providence Towers Executive Suite - Dallas

The Foundry Group - Mockingbird Station

The Idea Engine - Deep Ellum

Strengthening the Foundation of Young Health Care Industry Businesses

Listed below are some of the most notable incubators and accelerators in the Dallas - Fort Worth Region.

1 **Bill J. Priest Institute, a campus of El Centro College**

Developed in 1989, the Bill J. Priest Institute is recognized for its commitment to workforce training, services, small business development and career services. It focuses on cutting edge strategies to define solutions that impact economic development.
(www.elcentrocollege.edu/bjp)

2 **AT&T Foundry**

The AT&T Foundry is designed as a collaborative environment in which developers gain access to AT&T resources they couldn't get anywhere else. The goal is to bring innovations to market faster.

3 **Biopipeline at BioCenter, UT Southwestern Medical District**

Pipeline at BioCenter is a biomedical incubator located within the BioCenter at Southwestern Medical District. Pipeline includes laboratory and office space for biomedical start-up companies. Pipeline's goal is to develop successful companies within the Southwestern Medical District and help make the North Texas region a major biomedical industrial location. (pipelineatbiocenter.com)

4 **Biotech Manufacturing Center of Texas (BMC)**

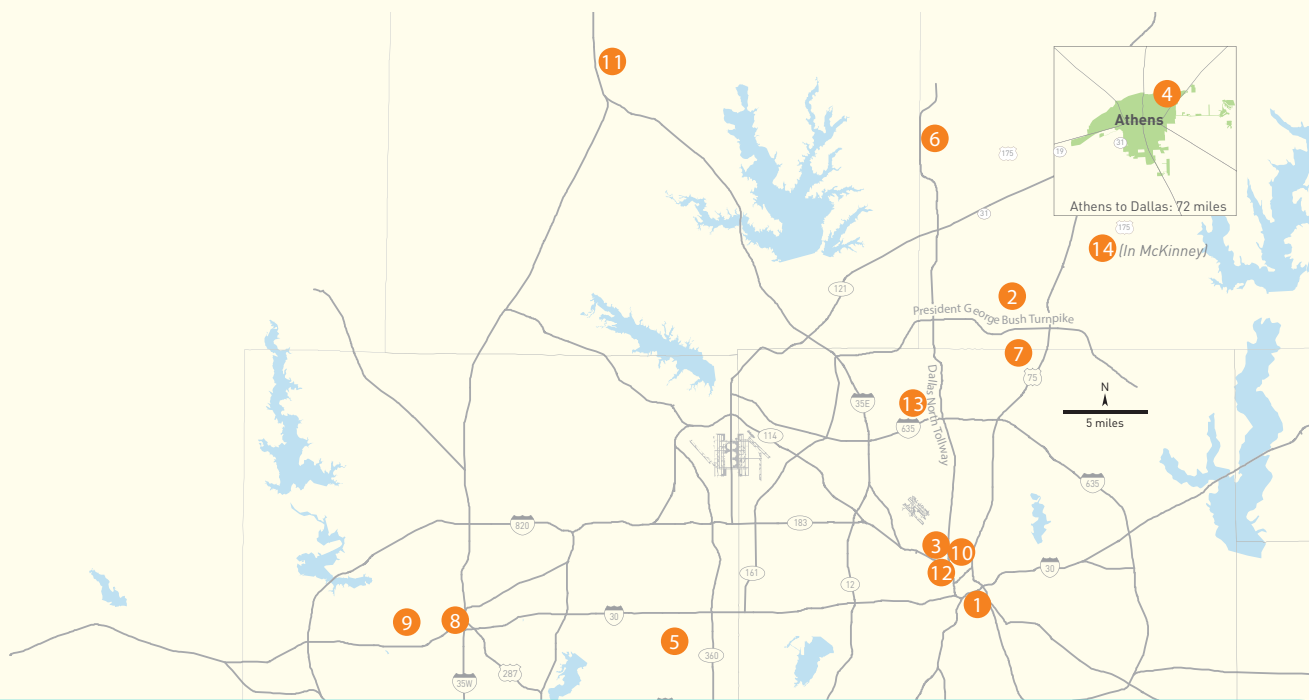
Located in Athens, BMC is a nonprofit biotech incubator providing a full-scale manufacturing environment for qualified medical device development. The BMC is the only medical business incubator in the U.S. that offers total manufacturing of newly conceived medical devices. (www.athensedc.com)

5 **The Arlington Business Accelerator**

Operated by the the Center for Innovation at Arlington, a public/ private partnership led by the Arlington Chamber of Commerce and the University of Texas at Arlington, providing the support necessary to incubate the growth of invention disclosures, and intellectual property discoveries, to assist start-up businesses, and to accelerate the growth of existing businesses. (www.thecenterforinnovation.org)

6 **North Texas Enterprise Center for Medical Technology (NTEC)**

As the leading medical technology incubator in the Southwest, NTEC is a not-for-profit corporation that assists entrepreneurs with starting and growing a new medical technology venture. The center provides a broad base of support to entrepreneurs, both internally and through its extensive resource network.
(www.ntec-inc.org)



7 Institute for Innovation & Entrepreneurship's Venture Development Program (UTD)

The Institute's role is that of a facilitator, catalyst, and program sponsor - leveraging the power of ideas and technology to create new ventures and add economic, social and cultural value to our community. [www.innovation.utdallas.edu]

Venture Development Center (UTD) is a 12,700 square foot facility dedicated to assisting companies affiliated with UT Dallas move commercially viable innovations from the lab to the marketplace. Five of the current eleven tenants are health-related companies, in fields including medical devices, diagnostics, and medical nanotechnology. [utdallas.edu/vdc]

8 TECH Fort Worth

TECH Fort Worth is a nonprofit business incubator helping entrepreneurs commercialize innovative technologies that will impact the environment, empower the community, and improve health care. TECH Fort Worth is a public/private partnership of the University of North Texas Health Science Center at Fort Worth, the City of Fort Worth and the Fort Worth business community. [www.techfortworth.org]

9 TECH Fort Worth Acceleration Lab

Located at the Center for BioHealth on the campus of UNT Health Science Center, the Acceleration Lab provides support for technology-based companies enrolled in the Acceleration Program at TECH Fort Worth. Outfitted laboratories, office space, admission support, and business development assistance is offered.

10 Tech Wildcatters and Health Wildcatters

Mentorship-driven seed accelerators for technology and health care startups. Each year a select few early stage

startup companies are invited to Dallas for a 12-week accelerator iBoot camp. The companies receive seed funding, intensive top-notch mentorship, and the opportunity to pitch to angel investors, venture capitalists and corporate development teams at the end-of-program Pitch Day. [techwildcatters.com] and [healthwildcatters.com]

11 UNT Discovery Park - Innovation Greenhouse

UNT Discovery Park is a progressive research park that provides life sciences and high technologies companies and organizations access to a positive infrastructure, business and commercialization resources, enabling growth escalation, and commercialization. [discoverypark.unt.edu]

12 The Dallas Entrepreneur Center (The DEC)

Supports the startup ecosystem through incubation capacity for entrepreneurs, a series of education and training resources, access to capital through venture capital office hours, and hosting a seed accelerator program, VentureSpur.

13 Accelerated Ventures Program

Launched in 2013, Accelerated Ventures Program is a collaboration between the Town of Addison and Baylor University's Hankamer School of Business to provide office space and ancillary support to business start-ups emanating from the university. The focus is to strengthen and increase the longevity of these business start-ups so they grow organically and set roots in North Texas. [www.acceleratedventuresprogram.com]

14 The Collide Center

A collaborative effort by Curious Complex and McKinney Economic Development Corporation (MEDC), with the goal of sparking innovation and promoting emerging technologies within the city of McKinney. [http://collidecenter.com/]

Investment Activity, Technology Transfer & Commercialization

The Dallas-Fort Worth area has a varied investment and commercialization community. Many area universities and research institute programs are responsible for bringing new technologies and breakthroughs to the forefront, while private capital invests in the long term success of the new products. Because of the diversity in the DFW health care industry, companies and investors from all over the world are looking at our region.

EMERGING TECH FUND

The Texas Emerging Technology Fund, created by the Texas Legislature in 2005, provides selected, early-stage investments in new, technology-based, private entrepreneurial entities that collaborate with public or private higher education institutions in Texas, and which, if successful, may provide significant economic benefit to the state. Below are the healthcare related ETF award winners for North Texas.

DESCRIPTION	AWARD
<i>ZS Pharma (2010)</i>	\$2,000,000
<i>OnTrack Imaging (2009)</i>	\$250,000
<i>OrthoKinematics (2009)</i>	\$1,500,000
<i>Gradalis (2009)</i>	\$1,750,000
<i>MacuCLEAR (2009)</i>	\$1,700,000
<i>Dentlight (2008)</i>	\$250,000
<i>MicroTransponder (2008)</i>	\$1,380,000
<i>Resonant Sensors (2007)</i>	\$600,000

EARLY STAGE AND OTHER PRIVATE INVESTMENT IN DFW HEALTH CARE INDUSTRIES IN 2012

The Texas Entrepreneur Networks Startup Funding data represents private investments made into Texas startup and early stage companies. More information is available at www.texasenetworks.com. A few examples of companies receiving funding are shown.

TOTAL VALUE OF ALL HEALTH CARE-RELATED DEALS IN DFW IN 2012

\$340,825,530

HEALTH CARE-RELATED DEALS IN DFW IN 2012

103

% OF TOTAL STATE HEALTH CARE-RELATED FUNDING IN DFW

44.8%

% OF TOTAL STATE HEALTH CARE-RELATED DEALS IN DFW

47.5%

\$2 Million

PerioSciences researches, formulates, and markets topically applied, antioxidant-based oral care and oral hygiene products. Founded in 2008 and headquartered in Dallas, Texas, PerioSciences has established a new category of products – antioxidant-based oral care.

\$3.1 Million

Orametrix is the leading industry provider of innovative 3-D technology solutions improving the quality and efficiency of orthodontic care. The SureSmile system allows the use of precision digital tools throughout all phases of the orthodontic treatment process - diagnosis, treatment planning and monitoring, and archwire customization.

TECHNOLOGY TRANSFER AND COMMERCIALIZATION

Today, important medical research begins in university laboratories, and many of their ideas and results are developed into commercialized products. Technology Transfer offices at DFW universities manage the intellectual property developed on their respective campus. Below are just a few of the commercialization projects among area universities.

University of Texas at Dallas

- Between 2008 and 2011, 11 UTD start-ups were formed, raising more than \$20M and creating over 50 high-tech jobs in the region. The Venture Development Center, which opened in September 2011, received the Dallas Regional Chamber 2012 Innovation Catalyst Award. Four UT Dallas start-ups have received funding through the Texas Emerging Technology Fund, and at least four have received SBIR/STTR funding.

UT Southwestern

- The Office for Technology Development has negotiated over 540 license agreements for both patented, non-patented, and copyrighted technologies in both the US and abroad.

\$4 Million

Microtransponder is a medical device company spun out from the University of Texas at Dallas in 2007. Their mission is to bring meaningful relief to patients with neurological disease. The company currently is developing therapies for stroke, tinnitus, and chronic pain.

\$46 Million

ZS Pharma, Inc. is focused on the development and commercialization of proprietary oral sorbent technology that will significantly improve the clinical outcomes of those patients suffering from toxic conditions associated with kidney and liver disease. ZS-9, a crystal form of zirconium silicate, compound selectively removes life-threatening toxins from patients suffering from kidney and liver disease and related conditions. Initial human clinical testing was focused on patients with elevated levels of potassium in their blood, a condition known as hyperkalemia.

\$1.1 Million

Access Pharmaceutical is an emerging biopharmaceutical company specializing in products for cancer and supportive care. Access currently has one FDA-approved product, two products in Phase II clinical development, three products in preclinical development.

\$1.2 Million

Ikonopedia is a medical information technology company founded by internationally renowned breast radiologists. The company has developed a novel system for radiologists to improve efficiency and standardization of mammography readings.

\$12.45 Million

Palmaz Scientific was created in 2008 with a vision to provide a technology platform that innovates medical device science. Today this vision is realized with a potentially game changing nanotechnology platform applying a physical vapor deposition process to produce more reliable implantable prosthetic devices.

\$4.2 Million

ULURU developed and commercializes Altrazeal®, a transforming powder dressing with proprietary Nanoflex® technology, for the management of exuding wounds.

\$1.2 Million

Natural Dental Implants, Inc. is a wholly-owned subsidiary of Natural Dental Implants AG, the makers of the REPLICATE® Non-Surgical Tooth Replacement System, the first 100% customized, patient specific alternative to traditional dental implants and three unit dental bridges.

IN THE FIRST HALF OF 2013, OVER \$100 MILLION HAS BEEN INVESTED IN STARTUP AND EARLY STAGE DFW HEALTH CARE COMPANIES

- Products on the market include a clot-buster drug, a therapeutic to inhibit kidney-stone formation, a calcium supplement to prevent osteoporosis, and a detachable coil for the treatment of aneurysms.

University of Texas at Arlington

- In the past 5 years, restricted research expenditures have increased more than 50%, and faculty disclosures of intellectual property has more than doubled.

Baylor Research Institute

- Baylor Research Institute has issued more than 40 patents. BRI has recently entered into research collaboration agreements with Hoffmann-La Roche Ltd. and Eureka Genomics. BRI and

Roche will jointly develop programs emerging from the human immunology platforms developed at the Baylor Institute for Immunology Research. The alliance between BRI and Eureka could potentially lead to advancements in the prevention, management, and treatment of colorectal cancer.

UNT Health Science Center

- Services and benefits are available to early stage entrepreneurial life science companies via the UNT Health Science Center's Executives-In-Residence (EIR) Program. The EIR Program connects clients to its team of expert life science advisors, offers a range of administrative and networking services and provides access to inexpensive start-up facilities and space.

**Texas A&M Health Science Center
Baylor College of Dentistry**

- The Office of Technology Development at Texas A&M Health Science Center Baylor College of Dentistry was established in 2006 to facilitate technology transfer by working cooperatively with researchers whose work possesses commercialization potential. The office is housed within HSC-BCD's Office of the Associate Dean for Research and Graduate Studies.

Accolades and Regional Statistics

The strengths of the Dallas-Fort Worth health care industry are evident in the statistics. You see it in the number of hospitals and medical facilities in our region, the number of research grants given to our universities, and the amount of new and exciting medical products being created at area companies. We are home to two Fortune 500 health care related companies, Tenet Health System and Kimberly-Clark, and countless other significant corporate operations. Our health systems provide an unmatched service to people of Dallas-Fort Worth. But don't take our word for it. Year after year, the region's prestigious health care institutions are lauded by publications such as *US News and World Report*. It's hard not to notice the positive impact of the health care industry on our region. This is one of the reasons why Dallas-Fort Worth is consistently among the top places to work, the best places to live, and the best places for investment.

\$214 MILLION

THE TOTAL AMOUNT OF NATIONAL INSTITUTES OF HEALTH (NIH) GRANTS GIVEN TO DFW ORGANIZATIONS IN 2012 AND \$170 MILLION AS OF SEPTEMBER 2013

#1

BEST CHILDREN'S HOSPITAL
ORTHOPEDICS
Children's Medical Center
of Dallas - Texas Scottish
Rite Hospital for Children

US News and World Report 2013-2014

ACCOLADES

University of Texas Southwestern Medical Center named 46th best university in the world by the Center for World University Rankings in 2013.

Three North Texas companies have been named to *Modern Healthcare's* inaugural "Healthcare's Hottest" list. The rankings recognize the 40 fastest-growing companies and organizations in the \$2.7 trillion health care industry. Local companies making the list include MedSynergies (No. 8), NorthStar Anesthesia (No. 15), and Methodist Health System (No. 33).

> 30

The total health industry employment for DFW is greater than the health industry of 30 other states

The Harold C. Simmons Cancer Center at UT Southwestern attained National Cancer Institute (NCI) designation in 2010

U.S News and World Report Best Graduate Schools edition (2012) ranks UT Dallas graduate audiology program 3rd nationally and its speech-language pathology program 11th.

US NEWS AND WORLD REPORT 2013-2014

CHILDREN'S MEDICAL CENTER OF DALLAS RANKED NATIONALLY IN 10 PEDIATRIC SPECIALTIES:

- #28 in Cancer
- #19 in Cardiology & Heart Surgery
- #27 in Diabetes & Endocrinology
- #16 in Gastroenterology
- #41 in Neonatology
- #14 in Nephrology
- #21 in Neurology & Neurosurgery
- #1 in Orthopedics
- #32 in Pulmonology
- #16 in Urology

BAYLOR UNIVERSITY MEDICAL CENTER RANKED NATIONALLY IN 6 ADULT SPECIALTIES:

- #16 in Gastroenterology & GI Surgery
- #32 in Gynecology
- #18 in Nephrology
- #24 in Orthopedics
- #22 in Pulmonology
- #32 in Urology

UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER RANKED NATIONALLY IN 2 ADULT SPECIALTIES:

- #18 in Neurology & Neurosurgery
- #21 in Urology
- #29 in Gynecology

COOK CHILDREN'S MEDICAL CENTER IN FORT WORTH IS RANKED NATIONALLY IN 5 PEDIATRIC SPECIALTIES:

- #38 Cancer
- #31 Diabetes & Endocrinology
- #24 Neonatology
- #30 Nephrology
- #46 Neurology & Neurosurgery

THE UNT HEALTH SCIENCE CENTER IS RANKED NATIONALLY IN A VARIETY OF DIFFERENT ACADEMIC AREAS, INCLUDING:

- #12 Rural Medicine
- #15 Geriatric Medicine
- #16 Family Medicine
- #35 Primary Care

In addition, UNT Health Science Center has the highest percentage of medical students entering primary care of all Texas medical schools (and second highest in the country).

THE DFW HEALTH CARE INDUSTRY **GREW** 5.3% FROM 2010 - 2012



9 NORTH TEXAS HEALTH CARE COMPANIES MAKE INC.'S "FAST GROWING" LIST

Inc. magazine has released its annual ranking of the nation's 5,000 fastest-growing private companies, with 9 North Texas healthcare companies making the list.

- No. 437** - Onsite Health Diagnostics
- No. 907** - Sundance Healthcare
- No. 994** - Goldfish Medical Staffing
- No. 1,129** - MedSys Group
- No. 1,819** - Homeland HealthCare
- No. 2,249** - Homecare Homebase
- No. 2,798** - First Choice Emergency Rooms
- No. 2,932** - LiquidAgents Healthcare
- No. 4,405** - NorthStar Anesthesia

TOP LARGEST NURSING SCHOOL IN TEXAS

UT Arlington College of Nursing (UTACON) is ranked among the top 5 largest nursing programs in the United States.

FORTUNE 500 HEALTH CARE-RELATED HEADQUARTERS

- TENET HEALTHCARE
- KIMBERLY-CLARK

NOBEL PRIZE LAUREATES IN HEALTH SCIENCES

UT Southwestern Medical Center has six nobel prize winners, four of whom are active faculty

1985 - Physiology or Medicine
Dr. Michael Brown
Dr. Joseph Goldstein

1988 - Chemistry
Dr. Johann Deisenhofer

1994 - Physiology or Medicine
Dr. Alfred Gilman

2011 - Physiology or Medicine
Dr. Bruce A. Beutler

2013 - Physiology or Medicine
Dr. Thomas C. Südhof

HEALTH CARE COMPANIES MOVING TO DFW

TELETECH BRINGS 400 HEALTH CARE-RELATED SALES AND SERVICE JOBS TO ENNIS, TEXAS

Business Wire, August 2013

TeleTech Holdings Inc., a leading global provider of technology-enabled customer experience solutions, announced that they are expanding operations to Ennis, TX creating 400 new jobs to serve the company's growing healthcare client base.

HUMANA TO OPEN MAIL-ORDER PHARMACY, CREATE 620 JOBS IN IRVING

Dallas Business Journal, May 2013

Kentucky based health and wellness company Humana Inc. announced Wednesday it plans to open a mail order pharmacy call center and support operation in Irving that is expected to create more than 620 new jobs over the next three years.

SAN DIEGO COMPANY TO BUILD \$225 MILLION PROTON THERAPY CENTER IN DALLAS

D Magazine, July 2012

Advanced Particle Therapy is building a 100,000 square-foot, \$225 million proton therapy center in Dallas. Construction will get under way in early 2013.

CHRISTUS HEALTH TO BRING 650 JOBS TO IRVING IN HQ MOVE

Dallas Business Journal, January 2012

After a four-city search, Christus Health will consolidate its corporate offices in Irving in a move that will add about 650 jobs in North Texas.

Extend Health Inc. Opens Second Center in Richardson; Plans to Hire 200 Employees, Bringing Local Total to 500+

D Healthcare Daily, July 2012

Extend Health Inc., which operates the country's largest private Medicare exchange, has opened a second service center in Richardson. It plans to hire another 200 employees, bringing its total local jobs base to more than 500.

Inogen Inc. expands to Richardson; plans to hire 200 employees

Dallas Business Journal, May 2012

California-based Inogen Inc., a manufacturer and oxygen therapy equipment and services provider, announced it will open a corporate office in Richardson and hire 200 employees in the next 18 months.

STATE FARM TO ANCHOR RICHARDSON MIXED-USE DEVELOPMENT

Dallas Morning News, December 2012

A new regional office for State Farm Insurance will anchor a \$1.5 billion mixed-use transit development to be constructed in Richardson.

Greatbatch Inc. moving corporate HQ to Frisco

Dallas Business Journal, May 2012

The medical manufacturing company announced plans to relocate its global headquarters from Buffalo, NY to Frisco to take advantage of an already-established medical device cluster in the Dallas-Fort Worth area.

UnitedHealth Group creates nearly 1,500 new jobs in Texas, including 800 in the Dallas rea

Market Watch, June 2012

UnitedHealth Group, the nation's leading health benefits and services company, announced today it is creating nearly 1,500 new jobs in Texas, expanding its already significant presence in the state.

Healthpoint Biotherapeutics to create state-of-the-art cell sciences manufacturing facility in Fort Worth

Company Press Release, June 2012

The new, state-of-the-art facilities will comprise 25,000 SF of manufacturing infrastructure, labs and clean room space for the production of cell-based therapies.

CCS Medical of Florida moves to DFW

Dallas Business Journal, September 2011

CCS Medical Inc. will relocate its corporate headquarters to Farmers Branch from Clearwater, Florida and open a distribution facility in Coppell-bringing 230 new jobs to North Texas.

AccentCare to hire 100 with Dallas move

Dallas Business Journal, March 2011

One of the largest home health care companies in the country is moving its corporate HQ from California to Dallas creating more than 100 jobs.

Enterprise Fund money to aid company's move to Fort Worth

Dallas Business Journal, December 2011

Ferris Manufacturing, an Illinois maker of advanced wound dressings, will be moving to Fort Worth... employing up to 100.

HMS Holdings Corp., the parent company of Healthcare Management Systems, moved its HQ from New York City to Irving

Dallas Business Journal, July 2010

The company, which specializes in identifying fraud, waste & abuse in health care claims, moved into its 223,500 SF HQ in Las Colinas (Irving, Texas).

DALLAS
REGIONAL
CHAMBER®

Join Us as we...

Lead business forward through increased visibility and engagement opportunities

Educate our members about top business issues—starting with our local education system

Provide access to business leaders and elected officials, information, and exclusive programming

Develop our region by attracting and retaining more companies

Advocate for public policies that improve the business environment and boost economic prosperity

TOGETHER WE WILL LEAD THE DALLAS REGION TO BECOME THE MOST ECONOMICALLY PROSPEROUS
REGION—AND THE MOST DESIRABLE PLACE TO LIVE AND WORK—IN THE UNITED STATES.

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H E A L T H



HCA North Texas



UT SOUTHWESTERN
M E D I C A L C E N T E R

About the Dallas Regional Chamber

The Dallas Regional Chamber is the area's leading membership-driven business organization committed to promoting economic prosperity by leading economic development, driving improvements in public education, influencing public policy, and catalyzing and advocating for regional partnerships. The Chamber works to ensure that the Dallas region will become the most economically prosperous region - and the most desirable place to live and work - in the United States. The Chamber is a not for profit organization comprised of businesses which represent all facets of the North Texas business community.

Dallas Regional Chamber®, 500 N. Akard Street Suite 2600, Dallas, Texas 75201 (214) 746-6600.