2016

charlotte CHAMBER

CHARLOTTE: A NATIONAL HEALTH CARE CENTER

A NATIONAL HEALTH CARE CENTER

Charlotte is a growing health care hub that is home to national and international leaders in the health care and life sciences field.

Charlotte has a broad range of companies in the health care and life sciences field that focus on everything from manufacturing to research and supply chain management to health care technology innovation. The health care sector is so crucial to the Charlotte area's economy that one in nine workers in the area is employed in health care or life sciences. That's more than 120,000 diverse workers of different skill sets and educational levels. From support professionals to physicians and life sciences researchers, much of the area's health care talent is recruited from the more than 28 nearby colleges and universities and 18 community colleges and technical institutes in the Charlotte region. Each year, more than 4,600 students in the area earn health care-related degrees from phlebotomy certifications to Ph.D.s in bioinformatics.

With the flagship institutions of two nationally ranked hospital systems in Carolinas HealthCare Systems and Novant Health, a growing health care technology scene and a world class research institution in the North Carolina Research Campus, Charlotte's health care and life sciences sector is poised to grow.

CHARLOTTE AT A GLANCE

- 45 hospital locations in the Charlotte MSA.
- 1 in 9 workers in the Charlotte MSA is employed in health care or life sciences.
- 1,222 physicians' offices in the Charlotte MSA.
- 121,367 employees in health care or life science sector in the Charlotte MSA.
- Nearly 6,000 health care or life science-related firms are located in Charlotte MSA.
- One of the largest, state-of-the-art Veterans Affairs Health Care Centers in the country.

IMPACT ANALYSIS

The impacts of the health care and life sciences sector go well beyond hospitals and research labs. Spending by health care companies and their more than 121,000 employees flows through the economy, creating jobs and income in supporting industries. In fact, 15.7 percent of the Charlotte MSA's economy is supported by the health care and life sciences sector, the Charlotte Chamber's 2016 economic impact analysis shows. Other results from that analysis show that the sector is responsible for the following:

$15.3 B

IN TOTAL WAGES AND BENEFITS

233,219

JOBS DIRECTLY AND INDIRECTLY SUPPORTED

$21.9 B

ECONOMIC IMPACT ON THE CHARLOTTE MSA ECONOMY

HOSPITAL

HEALTH CARE COMPANIES

CAROLINAS HEALTHCARE SYSTEM

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 35,700

Carolinas HealthCare System (CHS), one of the nation's leading health care organizations, provides health care and wellness programs throughout North and South Carolina. Its diverse network of more than 900 care locations includes some 40 owned and managed hospitals as well as freestanding emergency departments, physician practices, surgical and rehabilitation centers, home health agencies, nursing homes, community clinics, and behavioral health centers, along with hospice and palliative care services.

CHS personnel handle more than 12.5 million patient encounters annually. Some of CHS's best-known specialty centers include Levine Cancer Institute, Levine Children's Hospital, Sanger Heart & Vascular Institute, the CHS Neurosciences Institute, the Transplant Center, and comprehensive facilities providing physical rehabilitation and behavioral health services. Its cancer treatment facilities have been systematically integrated to expand patient support groups throughout the region and open up clinical trials to patients who reside in rural areas.

CHS is an active community partner in Charlotte, focusing on numerous outreach programs to encourage preventive health. Recent initiatives include early diagnosis and intervention for pre-diabetic patients, mental health first aid, and the prevention of childhood obesity. CHS also serves as the Charlotte campus of the UNC School of Medicine and offers a variety of nursing and allied health programs. Its graduate medical education opportunities include 20 residency programs and 15 accredited fellowship programs.

CHS FACTS

Undergoing a $150M expansion at Levine Cancer Institute, including a new outpatient center.

Two of its Charlotte hospitals were recognized among the top "Most Connected Hospitals."
[U.S. News & World Report, 2015]

Nationally ranked for two adult specialties: Ear, nose & throat and urology.
[U.S. News & World Report, 2015]

Best Children's Hospitals in five specialties: Cardiology & heart surgery, neonatology, nephrology, orthopedics, neurology and neurosurgery.
[U.S. News & World Report, 2015]

NOVANT HEALTH

HEADQUARTERS: Winston-Salem, N.C.
EMPLOYEES IN CHARLOTTE MSA: 11,000

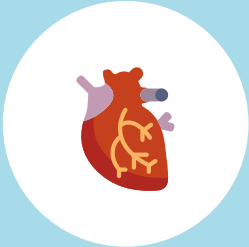
Novant Health is a comprehensive health care system with 13 medical centers spanning four states, including Novant Health Presbyterian Medical Center in Charlotte.

As the second largest medical group in the country, Novant focuses on providing convenient and innovative services to patients from primary to emergency care. MyChart is a technological innovation that connects patients to their health information with 24/7 access. Novant Health also offers e-visits and video medical appointments as a way to make health care more convenient and affordable.

> "THE QUALITY OF OUR PHYSICIANS, COMBINED WITH THE QUALITY OF OUR RESOURCES AND REGIONAL PARTNERS, PROVIDES THE INFRASTRUCTURE THAT MAKES CHARLOTTE A HUB FOR HEALTHCARE."
>
> **ANDY MUELLER, M.D.**

One of Novant's top priorities is specialty care. Novant Health Heart and Vascular Institute has partnered with Cleveland Clinic, giving children access to the clinic's world-renowned research and clinical trials. The St. Jude Affiliate Clinic at Novant Health Hemby Children's Hospital in Charlotte gives children with cancer and blood disorders access to more advanced treatments as well.

"At Novant Health, we're working hard to adapt to the needs of our community," said Andy Mueller, M.D., senior vice president of the greater Charlotte market. "We're enhancing service lines, opening new facilities and expanding access to care. The quality of our physicians, combined with the quality of our resources and regional partners, provides the infrastructure that makes Charlotte a hub for healthcare."



Novant Presbyterian Medical Center is high-performing in six specialties.
[U.S. News & World Report, 2015]

Ranked in the top 20 hospitals for health care delivery network.
[IMS Health]

Second largest medical group in the country.

13 medical centers and 480 outpatient locations.

NOVANT FACTS

HEALTH CARE
PROVIDERS

LARGEST 20
HEALTH CARE EMPLOYERS
CHARLOTTE MSA

Company	Employees	County
Carolinas HealthCare System	35,700	Regional
Novant Health	11,000	Regional
CaroMont Health Inc.	3,980	Gaston
Catawba Valley Medical Center	2,200	Catawba
Frye Regional Medical Center	2,150	Catawba
WG (Bill) Hefner VA Medical Center	1,700	Rowan
Tenet Healthcare Corp.	1,500	York
Iredell Health System	1,448	Iredell
Sava Senior Care	1,105	Regional
White Oak Manor	938	Regional
OrthoCarolina	936	Regional
Springs Memorial Hospital	875	Lancaster
Brookdale Senior Living Inc.	835	Regional
Lake Norman Regional Medical Center	775	Iredell
Charlotte Eye Ear Nose & Throat Associates PA	631	Regional
Mecklenburg EMS Agency	525	Mecklenburg
Davis Regional Medical Center	500	Iredell
Peak Resources	482	Regional
New Hope Carolinas	400	York
Autumn Care	400	Union

Source: Charlotte Chamber, 2016

OrthoCarolina is one of the nation's leading orthopedic practices with offices across the Southeast.

ORTHOCAROLINA
HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 936

WIth 38 offices in the Charlotte region, OrthoCarolina is one of the nation's largest orthopedic groups in the country. Due to its reputation, one quarter of the practice's patients come from out of town. Over the past few years, OrthoCarolina has focused on growing its nonprofit research at the OrthoCarolina Research Institute.

Nationally recognized for orthopedic research, OrthoCarolina partners with over 150 local organizations, companies, and sports teams. OrthoCarolina physicians are the official team physicians of the NFL's Carolina Panthers and more than 50 other local teams. The group has treated professional athletes including former New York Yankees shortstop Derek Jeter, NASCAR driver Tony Stewart and Panthers quarterback Cam Newton.

Consistently recognized as an excellent place to work, OrthoCarolina was named one of the Top 100 Best Places to Work in Healthcare (Beckers Hospital/ASC Review) three of the past six years. It has also been awarded one of Charlotte's Healthiest Employers and Top Work Places in Charlotte.

Care Ring provides quality health care for low-income individuals and families.

CARE RING

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 25

Care Ring, a nonprofit that provides care to indigent populations, partners with volunteer physicians to improve access to and quality of health care in the Charlotte area. Care Ring is recognized as a leader in providing affordable care largely due to the community partnerships it has built. By working with companies such as BlueCross BlueShield of North Carolina, Carolinas Healthcare Systems, Mecklenburg County, OrthoCarolina, Menaker Rodney Dentistry, Novant Health, Regions Bank, United Way, and Wells Fargo, Care Ring is able to reach more neighbors and promote healthy living for all Charlotteans.

For decades, Care Ring has been a recognized leader in providing and improving access to quality health care for low-income individuals. Through partnerships with health care professionals and the public and private sectors, Care Ring is able to serve thousands of uninsured and underinsured individuals every year.

NINTH LARGEST YMCA ASSOCIATION IN THE UNITED STATES

YMCA OF GREATER CHARLOTTE

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 4,000

The YMCA, one of the nation's leading nonprofits, promotes youth development and healthy living through several initiatives in Charlotte. The YMCA of Greater Charlotte, comprised of 19 membership locations and two resident camps, is the ninth largest Y association in the United States. The YMCA of Greater Charlotte engages approximately 274,000 men, women and children to improve the area's health and well-being, and provides opportunities to give back and support neighbors.

Deeply rooted in the community for more than 140 years, the YMCA of Greater Charlotte delivers a wide range of community health initiatives, including recreational sports activities, youth camps, health consultations, nutrition management, and wellness and prevention classes. Also involved in the Chamber's Healthy Charlotte Council, the YMCA helps to make Charlotte nationally recognized for its healthy initiatives and robust health services industry.

ARAMARK HEALTHCARE TECHNOLOGIES

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 70

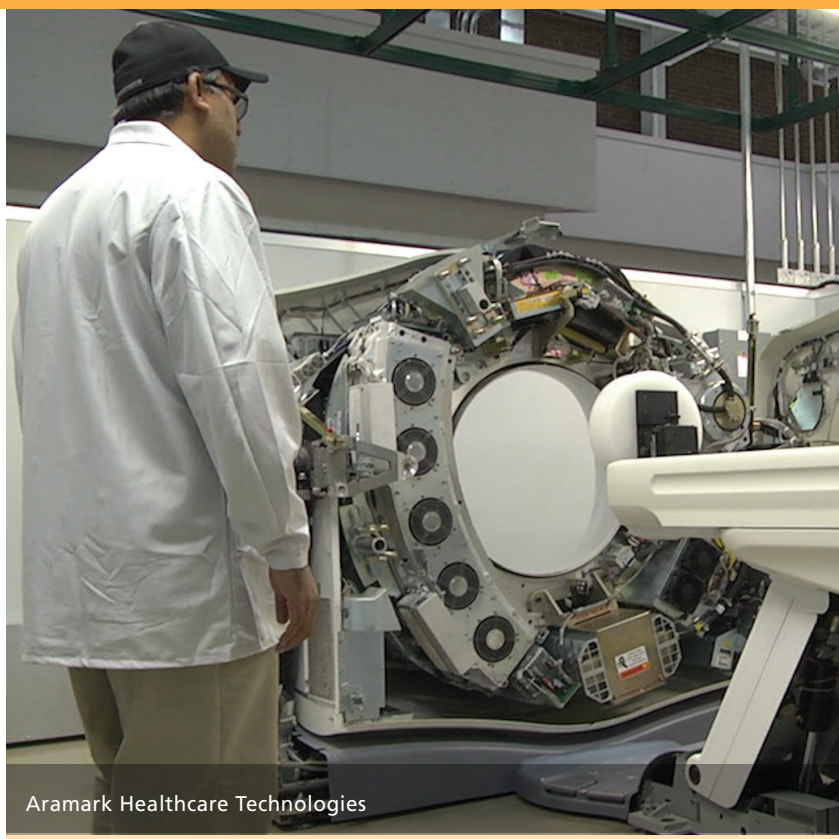
With medical technology continuing to evolve and health care systems becoming more connected, Aramark decided to create one hub for the development of its expertise and innovation. Focusing on research and development, Aramark constructed a multimillion-dollar Technology & Innovation center in Charlotte that brings program support staff, quality assurance, and technical operations together. With 70 experts in fields ranging from biomedical engineering to diagnostics imaging to software engineering, Aramark is able to test all of its parts and systems through patient care simulations and 32 live systems developed for hands-on training.

By consolidating training, parts testing and administrative services into one technology center, Aramark has been able to efficiently address its health care partners' needs while fueling innovation across the asset management continuum.

PREMIER INC.

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 900

Premier maintains one of the nation's largest comparative databases, allowing it to track and share clinical, financial, and operational data. It helps approximately 3,600 hospitals across the country and 120,000 other providers make decisions based on data and purchase quality medical supplies in bulk. Premier has seen tremendous growth since relocating its headquarters to Charlotte in 2009, increasing its employee base by approximately 40 percent. Premier attributes part of its success to Charlotte's strong and dynamic health care presence.



Aramark Healthcare Technologies

IMAGINE SOFTWARE

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 135

Headquartered in Charlotte, Imagine Software is a homegrown company that serves the technology needs of health care providers across the country. With a wide variety of software solutions, Imagine Software provides billing automation software, revenue management and analytics applications to over 20 specialty areas including hospitals, anesthesiology, pathology, radiology and urgent care.

Started in a basement over 16 years ago by its founder, Sam Khashman, ImagineSoftware found success in Charlotte and has plans to employ 135 people by the end of 2016. With an increasing number of technology-driven competitors in the health care industry, Imagine Software differentiates itself by staying true to its values and roots as a software company. "Imagine Software is different than many others because our emphasis is on culture and our focus is technology. Preserving that focus allows us to stay on top of emerging tech trends, provide an excellent work climate, and remain competitive in the health care market," said Khashman.

TOP 20 MOST COMMON
HEALTH CARE OCCUPATIONS
CHARLOTTE MSA

Occupation	Employed	Avg. Annual Salary
Registered nurses	23,330	$60,770
Nursing assistants	10,570	$23,310
Home health aides	8,260	$19,290
Licensed practical and licensed vocational nurses	3,790	$41,660
Medical assistants	3,550	$31,930
Pharmacy technicians	3,230	$30,570
Physicians and surgeons	1,930	$226,140
Dental assistants	1,970	$38,810
Pharmacists	2,220	$120,960
Emergency medical technicians and paramedics	1,810	$36,050
Dental hygienists	1,320	$69,800
Medical records and health information technicians	1,380	$35,240
Radiologic technologists	1,540	$54,920
Physical therapists	1,120	$82,960
Massage therapists	920	$38,370
Medical and clinical laboratory technicians	1,100	$41,650
Family and general practitioners	650	$233,500
Medical and clinical laboratory technologists	890	$57,670
Phlebotomists	1,050	$29,710
Nurse practitioners	780	$100,830

Source: Bureau of Labor Statistics and JobsEQ

MANUFACTURING, LIFE SCIENCES AND RESEARCH

LINET AMERICAS

HEADQUARTERS: Charlotte, N.C.
EMPLOYEES IN CHARLOTTE MSA: 16

Based in the Czech Republic, LINET chose to establish its American headquarters in Charlotte because of its connectivity and business-friendly environment. LINET manufactures hospital beds that are designed for the ICU and medical-surgical environments. These beds help facilitate mobility and pain management and reduce infection rates. Since establishing a U.S. headquarters six years ago, the company has doubled its revenue every year.

North Carolina Research Campus

NORTH CAROLINA RESEARCH CAMPUS

HEADQUARTERS: Kannapolis, N.C.

Built on the 350-acre site of a former textile mill by Dole Corporation CEO David Murdock, the North Carolina Research Campus hosts eight universities and several private companies, including General Mills, LabCorp, Inc. and Monsanto. The campus is also home to the David H. Murdock Research Institute. While primarily focused on breakthroughs in biotechnology and nutrition research, the 350-acre campus also includes medical office space and a biotechnology workforce training institute through nearby Rowan-Cabarrus Community College.

MOST COMMON LIFE SCIENCE OCCUPATIONS

CHARLOTTE MSA, 2016

Occupation	Employees	Avg. Annual Wages
Environmental scientists and specialists, including health	704	$58,600
Medical scientists, except epidemiologists	555	$80,000
Biological technicians	324	$37,700
Natural sciences managers	317	$115,300
Biological science teachers, postsecondary	313	$63,000
Biochemists and biophysicists	173	$79,600
Biomedical engineers	144	$85,300
Microbiologists	111	$66,200
Life scientists	54	$69,700

Source: Bureau of Labor Statistcs, JobsEQ

MANUFACTURING, LIFE SCIENCES AND RESEARCH

Pelton & Crane's Charlotte manufacturing facility, an example of the dental equipment and supplies manufacturing industry.

TOP EIGHT LIFE SCIENCES INDUSTRIES

CHARLOTTE MSA, 2016

INDUSTRY	EMPLOYEES	AVERAGE WAGES
Medical, dental, and hospital equipment and supplies merchant wholesalers	2,080	$88,940
Pharmaceutical preparation manufacturing	1,239	$83,889
Surgical and medical instrument manufacturing	921	$74,437
Surgical appliance and supplies manufacturing	844	$62,133
Biological product (except diagnostic) manufacturing	464	$95,837
Dental laboratories	371	$36,028
Analytical laboratory instrument manufacturing	169	$79,916
Dental equipment and supplies manufacturing	161	$51,741

Source: JobsEQ; industries in green have higher than average concentration in Charlotte MSA.

HEALTH CARE
EDUCATION AND WORKFORCE

Queens University nursing students undergo clinical immersion experiences.

QUEENS UNIVERSITY OF CHARLOTTE

BLAIR COLLEGE OF HEALTH

Blair College of Health at Queens University serves the Charlotte health care system in many capacities. With an average of 600 students enrolled, the college fills a growing demand for nurses in Charlotte, offering both bachelor's and master's degrees in nursing. The Health Sciences program prepares students for careers in bioscience, occupational therapy, physical therapy and healthcare research. The Kinesiology department focuses on exercise and sport sciences, sport management and health science.

Students undergo clinical immersion experiences at both Carolinas HealthCare System and Novant Health to provide an interactive experience for seniors in the nursing program. Carolinas Medical Center is a collaborative partner in shaping the curriculum for the master's degree program in nursing. Students also have the opportunity to volunteer for clinics at Charlotte public and nonprofit organizations, including Care Ring, Mecklenburg County Health Department and Charlotte Mecklenburg Schools.

More than 25 percent of Queens' student body is enrolled in a program within the Blair College of Health.

UNIVERSITY OF NORTH CAROLINA CHARLOTTE

HEALTH CARE INFORMATICS GRADUATE PROGRAMS

The University of North Carolina Charlotte (UNC Charlotte) serves as a key source of talent for the health care industry in the Charlotte region. From the School of Nursing to the College of Health and Human Services, UNC Charlotte fosters education in areas such as public health, health administration, social work and gerontology. UNC Charlotte is also helping to meet the growing demand for data scientists in the health care field through its Health Informatics program.

The only program of its kind in the region, UNC Charlotte's Health Informatics Masters program teaches students how to merge health care research with data. As health care entities rely heavily on technological innovations and data collection, data scientists are key to managing those processes. The program is appealing to a number of professionals in different industries, from nurses and physicians to information technology analysts and computer scientists. There is no shortage of IT and data analysts because of Charlotte's large banking base. The Health Informatics program aims to leverage that talent so that hospitals and medical offices can build, maintain, and better utilize their data.

The Health Informatics program relies on valuable partnerships with companies, including Carolinas HealthCare System, Novant Health, IBM Watson, SAS, Premier Inc, and Duke Health help provide the community with well-prepared data scientists.

HEALTH CARE
EDUCATION AND WORKFORCE

CERTIFICATES AND 2-YEAR DEGREES

PROGRAMS & OCCUPATIONS*	EDUCATION
Dental Assisting/Assistant (57)	Carolinas College of Health Sciences
Dental Hygiene/Hygienist (61)	Catawba Valley Community College
Licensed Practical/Vocational Nurse Training (122)	Central Piedmont Community College
Massage Therapy/Therapeutic Massage (111)	Cleveland Community College
Medical Administrative/Executive Assistant and Medical Secretary (67)	Gaston College
Medical/Clinical Assistant (634)	Mercy School of Nursing
Nursing Assistant/Aide and Patient Care Assistant/Aide (80)	Mitchell Community College
Radiologic Technology/Science – Radiographer (64)	Rowan-Cabarrus Community College
Registered Nursing/Registered Nurse (674)	South Piedmont Community College
Surgical Technology/Technologist (82)	Stanly Community College
	University of South Carolina – Lancaster
	York Technical College

MORE THAN 4,600 HEALTH CARE-RELATED DEGREES ARE AWARDED IN THE CHARLOTTE MSA EACH YEAR.

BACHELOR'S

PROGRAMS & OCCUPATIONS*	EDUCATION
Athletic Training/Trainer (46)	Cabarrus College of Health Sciences
Biology/Biological Sciences, General (332)	Gardner-Webb University
Foodservice Systems Administration/Management (219)	Lenoir-Rhyne University
Human Nutrition (15)	Pfeiffer University
Kinesiology and Exercise Science (68)	Queens University of Charlotte
Registered Nursing/Registered Nurse (507)	University of North Carolina at Charlotte
Respiratory Care Therapy/Therapist (45)	Wingate University

*Degrees awarded, 2015

Cannon Research Center Laboratories at Carolinas Medical Center.

GRADUATE

PROGRAMS & OCCUPATIONS*	EDUCATION
Athletic Training/Trainer (12)	Gardner-Webb University
Biology/Biological Sciences, General (23)	Lenoir-Rhyne University
Human Nutrition (31)	Northeastern University – Charlotte Campus
Kinesiotherapy/Kinesiotherapist (20)	Queens University of Charlotte
Nursing Administration (23)	University of North Carolina at Charlotte
Occupational Therapy/Therapist (23)	Winthrop University
Pharmacy (74)	
Physician Assistant (31)	
Registered Nursing, Nursing Administration, Nursing Research and Clinical Nursing (75)	
Registered Nursing/Registered Nurse (56)	

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HEALTHYCHARLOTTE Council

The Healthy Charlotte Council is focused on helping make Charlotte nationally recognized for its healthy initiatives and robust health services industry. The council is focused on three key areas- physical activity, nutrition and tobacco cessation, and uses the power of the business community to drive change. The council meets quarterly and offers opportunities for chamber members who are in the health industry, or just passionate about it, to network.

Learn more by visiting:

www.charlottechamber.com/healthycharlotte

UNC CHARLOTTE

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School of Nursing

Department of Kinesiology

School of Social Work

Department of Public Health Sciences

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NovantHealth.org/connect

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Enrollment is free. Sign up today at CarolinasHealthCare.org/VirtualVisit

Carolinas HealthCare System

*Patients must be physically located in North Carolina at the time of the Virtual Visit.

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CHARLOTTE

CHAMBER ECONOMIC DEVELOPMENT

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