

The background of the slide features a detailed, colorful microscopic image of biological cells, likely stained for histology. The cells are arranged in a grid-like pattern, with various shades of blue, green, and yellow highlighting different cellular components and structures. The overall appearance is that of a high-magnification micrograph of tissue.

20
YEARS

ARIZONA'S
BIOSCIENCE
ROADMAP

FLINN FOUNDATION

Yuma County

Resilient Communities

and

Sustainable Health Equity Forum

May 19, 2022

Agenda

- Flinn Foundation Background
- Foundation Focus Areas
- Arizona's Bioscience Roadmap
- Bioscience Sector Progress Data

Flinn Foundation



1965 - Founded by Dr. Robert S. and Irene P. Flinn

- Dr. Flinn, cardiologist, St. Joseph's Hospital, Phoenix

1965 - 1981

- Medical education, hospital equipment, focus on St. Joseph's

1981 - 2002

- Health policy, access to care, GME, biomedical research, social services; education; arts

2002 - present

- Narrowed health focus to biosciences
- Added civic leadership program

Focus Areas

Flinn Foundation Mission

Improving the quality of life in Arizona to benefit future generations.

Biosciences

- Building Arizona as a global center for research and commercialization
 - Curate Arizona's Bioscience Roadmap
 - Fund bioscience research and capacity-building
 - Support entrepreneurship and start-up ecosystem

Education

- Flinn Scholars Program: Full-ride undergraduate merit scholarship to Arizona universities. (19 Flinn Scholars from Yuma high schools since 1986)

Focus Areas

Flinn Foundation Mission

Improving the quality of life in Arizona to benefit future generations.

Civic Leadership

- Arizona Center for Civic Leadership: Enhancing civic life in Arizona through education, engagement, leadership programs.
 - Flinn-Brown Fellowship (10+ Flinn-Brown Fellows from Yuma County)

Arts and Culture

- Improving financial and creative health of Arizona's largest arts-and-culture organizations
 - Grants program

What Is Arizona's Bioscience Roadmap?

- 20-year plan to bring Arizona to competitiveness in biosciences
- Commissioned by Flinn Foundation, data tracked by TEconomy Partners

Goals

- Strong, diverse economy
- Access to health innovations for Arizonans

Focus

- Leverage **research strengths** and **build critical mass of firms**

Arizona's Bioscience Roadmap Steering Committee

Eve Ross, J.D. (chair), Vice President (retired), W.L. Gore and Associates

Hon. Heather Carter (vice chair), Executive Vice President, Greater Phoenix Leadership; former state legislator

Committee

- 120 leaders in science, health care, business, academia, policy; oversee Roadmap.
- Helped to create Roadmap in 2002 and informed its 2014 update.

Defining the Biosciences Industry



Agricultural Feedstock & Industrial Biosciences



Bioscience-Related Distribution



Drugs, Pharmaceuticals & Diagnostics



Medical Devices & Equipment



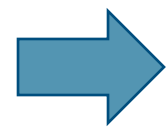
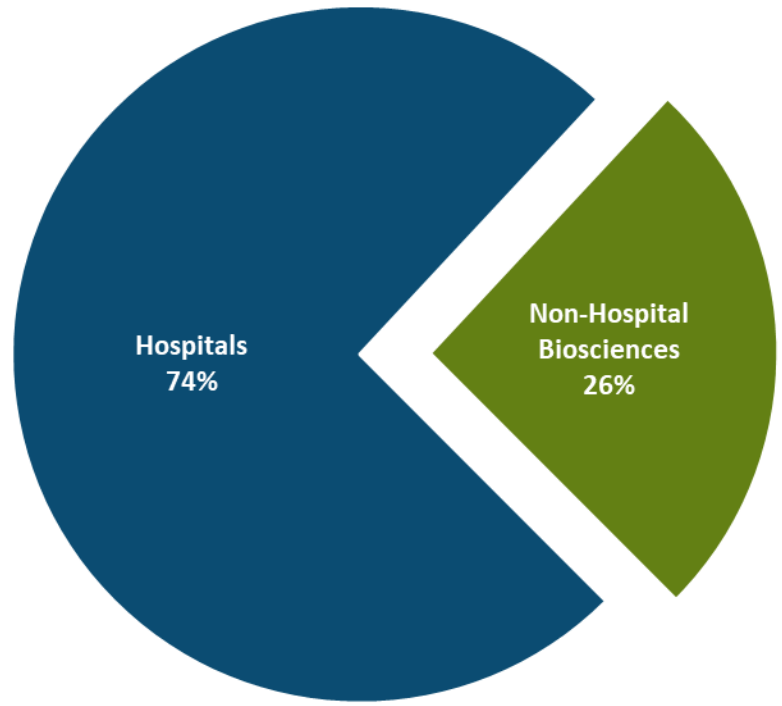
Research, Testing & Medical Labs



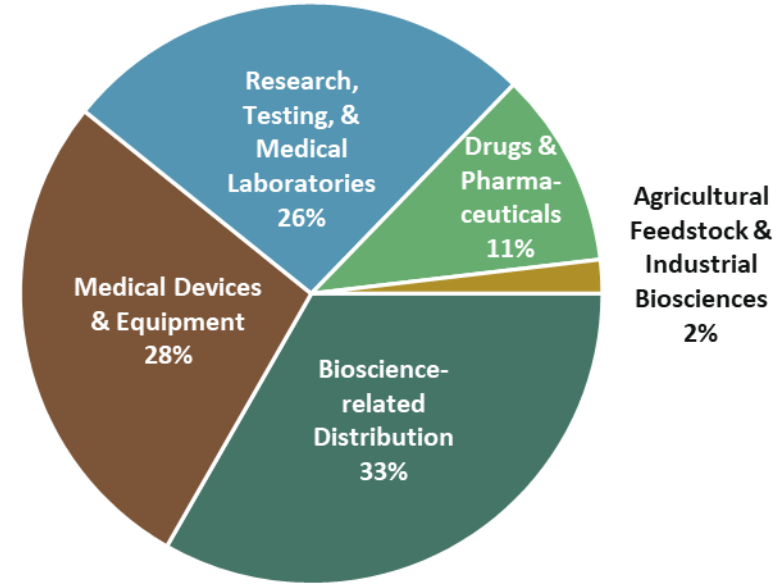
Hospitals

Metric: Arizona Bioscience Jobs, 2020

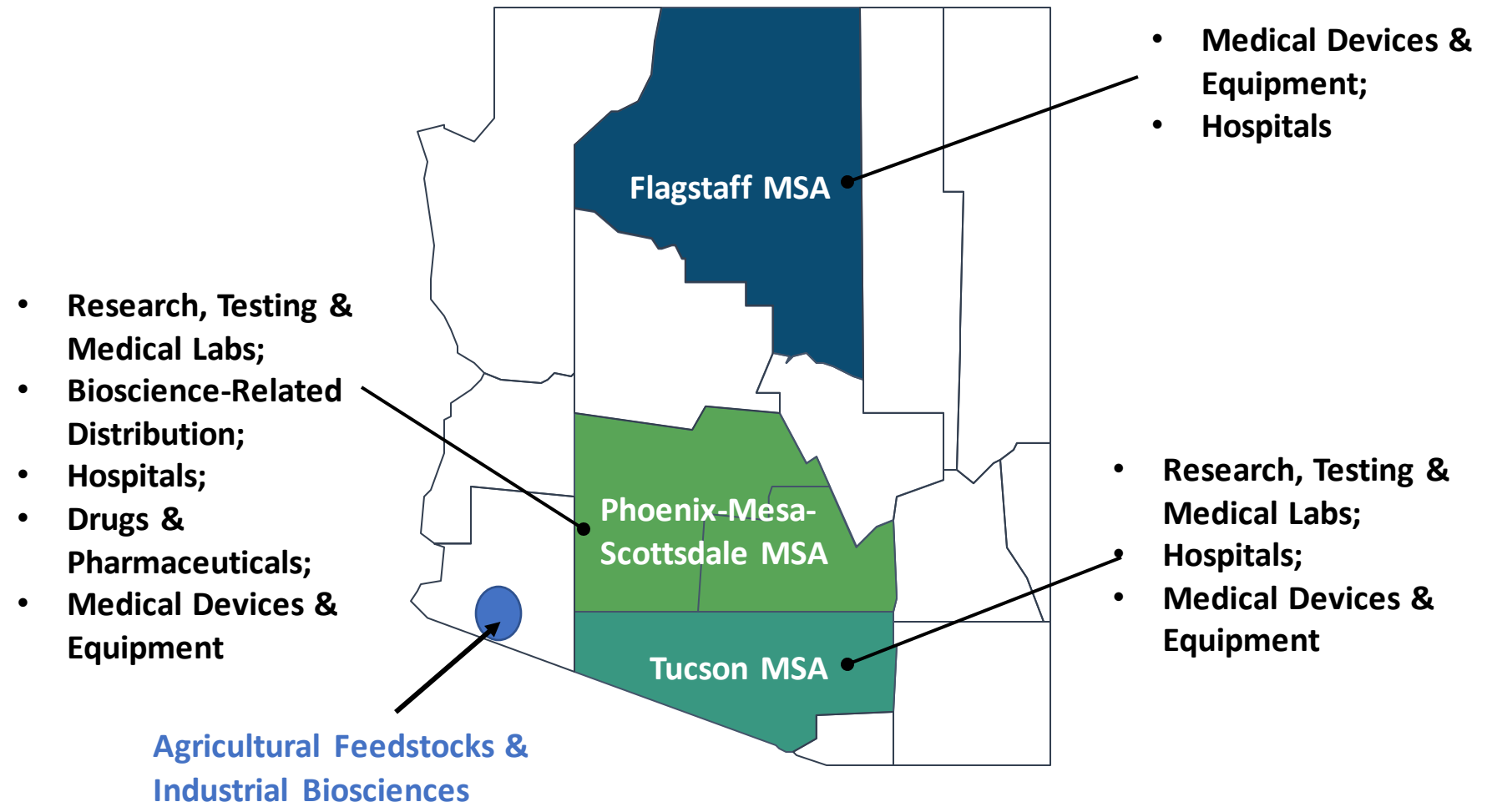
133,000 Total AZ Biosciences Jobs



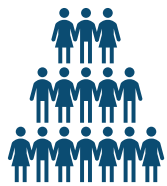
34,000 AZ Non-Hospital Biosciences Jobs



Regional Industry Strengths



Long-Term Trends



Jobs

2002: 73K
2020: 133K



1.8x



Univ. R&D

2002: \$273M
2020: \$623M



2.3x



VC

2002: \$34M
2021: \$240M



7.1x



NIH

2002: \$133M
2021: \$297M

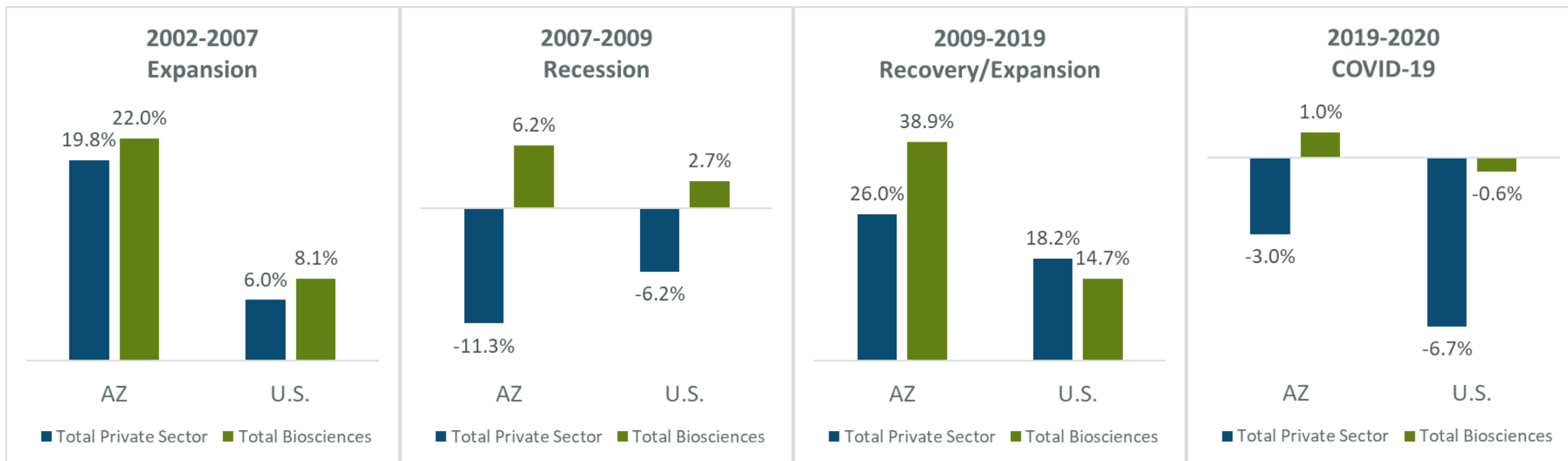


2.2x

Summary of Industry Metrics

Metric	Growth in AZ Since 2018	AZ Growth Relative to U.S.
Bio Industry Job Growth	↑	↑
Bio Average Wages	↑	↓
University Bio R&D Expenditures	↑	↓
NIH Funding	↑	↑
Bio University IP	↑	N/A
Bio Risk Capital	↑	↓

Metric: Employment Across Business Cycles



Note: Average private-sector salary: \$58K; Average bioscience salary: \$76K

Thank you!

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