

Appendix B

Subsection (14) (f)

An assessment of factors affecting the progress toward achieving the projected biotech industry cluster associated with the grantee's operations, as projected by economists on behalf of the Executive Office of the Governor

This subsection was completed with information provided by:

The Business Development Board of Palm Beach County, Inc. (“BDB”) is a public-private partnership established in 1982 to be the official economic development organization for Palm Beach County. It is a not for profit organization that is funded in part by the Palm Beach County Board of County Commissioners and in part by private corporate members. BDB is the official partner of Enterprise Florida, Inc. in Palm Beach County.

Workforce Alliance, Inc. is a nonprofit corporation chartered by the State of Florida. The organization operates a workforce development system in Palm Beach County that is responsive to the needs of both business customers and job seekers. Together with leaders from business, government, education and community agencies, Workforce Alliance links businesses in need of qualified employees with individuals seeking employment opportunities. Workforce Alliance operates three Career Centers (South, Central and West) and two Professional Placement Network locations in Palm Beach County. The organization administers an annual budget of approximately \$20 million.

BioFlorida is Florida's independent statewide bioscience association that serves its members through regional chapters in all areas of the state. BioFlorida provides the infrastructure to exchange information and ideas through industry specific programming, education, networking and legislative initiatives. BioFlorida focuses on creating and maintaining a favorable business and legislative environment; advancing the commercialization of research; and working with investors, private enterprise, government, academia and the financial and service sectors to further develop existing companies, launch start-up companies and attract new business to Florida. Headquartered in West Palm Beach, BioFlorida maintains close relations with the scientists and staff of Scripps Florida.

Enterprise Florida, Inc. (“EFI”) is the public-private partnership responsible for leading Florida's statewide economic development efforts. The organization's mission is to diversify Florida's economy and create better paying jobs for its citizens by supporting, attracting and helping to create businesses in innovative, high-growth industries. EFI focuses on high-value sectors such as: life sciences, information technology, aviation/aerospace, homeland security/defense and financial/ professional services. EFI works with a statewide network of regional and local economic development organizations to continually improve Florida's business climate and ensure its global competitiveness.

The expansion of the Scripps Research Institute to Florida has propelled Florida into the international spotlight for the bioscience industry. In 2006, Florida entered the top 10 states for the number of biotech companies according to Ernst & Young. *Expansion Management* magazine placed Florida in the top five states for both expansions and start-up companies in all sectors of bioscience. Since 2003, Florida has invested nearly \$1 billion in the bioscience industry and in January 2007 *FierceBiotech* ranked Florida #1 in the “Top 5 Regions Targeting Biotech Companies.” According to the publisher, this ranking was in large part due to the development of Scripps Florida and the momentum that has followed. Florida ranked first above Singapore, California, Scotland and Washington, respectively.

In Palm Beach County alone, Scripps’ presence has influenced the location of venture capital funds, a biotech incubator, increased clinical trial activity, enhanced education and workforce programs and numerous related service companies. Following the Scripps announcement, other bioscience institutes have expanded into Florida and resources for the industry have significantly grown in all areas of the state. In addition to large companies, organic growth of smaller companies, such as start-ups, spin-offs and research and development companies, are finding their way to Florida. Today, Florida houses over 130 biotechnology companies plus 100 pharmaceutical operations and 400 medical device companies. More than half of Florida’s 134 biotech and biomedical device companies were founded in the last six years, according to data compiled and published by the University of Florida’s Sid Martin Biotechnology Incubator. Combined with strong healthcare, clinical and service sectors, Florida is rapidly emerging as a leading destination for the biosciences.

In June 2007, the Milken Institute published a comprehensive study of the developing life science industry, titled ‘*Florida Life Sciences Road Map.*’ The study was sponsored by Enterprise Florida, Inc., Florida High Tech Corridor Council, Inc., and Workforce Florida, Inc. and is available in the Bioscience section of the Business Development Board’s website, www.bdb.org.

Below is a summary of contributions from organizations responsible for developing the biotech cluster in South Florida in 2006-2007:

BUSINESS DEVELOPMENT BOARD

- The **Life Science Strategic Steering Group** was formed in October 2006 to analyze the current status of the life science industry in Palm Beach County, determine existing gaps in the cluster, serve as an advisory group for the life science community, recommend steps to achieve goals and determine benchmarks to enhance the viability of the industry in the area. Leaders from academia, research, government and industry were selected as group members. In March 2007, the steering group presented their findings and strategies to the Palm Beach County Board of County Commissioners and published its report. The full report can be found on the Business Development Board’s website.
- The BDB was a sponsor at the **9th Annual BioFlorida Conference** in Gainesville. The Business Development Board held discussions with several industry leaders from around

the State of Florida and unveiled the Business Development Board's new Life Science Cluster collateral piece.

- The **BIO Conference** was held in Boston, Massachusetts in June 2007 and the BDB led the Palm Beach County delegation to this conference attended by over 22,000 people. The BDB coordinated with Enterprise Florida, Inc. and participated as a major sponsor of the Florida pavilion. Other Palm Beach County companies and organizations that participated include: Florida Atlantic University, Palm Beach Community College, BioTools, TransDermal Technologies, the City of Palm Beach Gardens, the Town of Jupiter, Rendina Companies, STH architects, the Greater Boca Raton Chamber of Commerce, the Jupiter Tequesta Juno Beach Chamber of Commerce, Workforce Alliance and Ruden McClosky.
- The Business Development Board attended and sponsored the 22nd Annual **Florida Venture Forum** at the Boca Raton Resort & Club. The event highlighted the innovation economy of Florida and emphasis was placed on the growing life science cluster. Over 1,300 people attended the conference and learned about the potential for a developing cluster in Palm Beach County.
- Another **BioScience Stakeholders' Meeting** was held in West Palm Beach in March 2007. The full-day meeting included panelists and breakout sessions and drew 240 leaders from regional businesses, industry, government and science sectors.
- The BDB participated in a regional **Canadian Trade Mission**, which was a joint effort of the Beacon Council of Miami Dade County, the Broward Alliance and the Business Development Board of Palm Beach County. Participants traveled to Toronto, Canada to brief the Greater Toronto Marketing Alliance regarding business opportunities in South Florida, discuss the business climate of South Florida with local media, tour a bioscience facility and establish relationships with potential expanding businesses.
- The BDB **continued recruitment of life science industries** to Palm Beach County. They hosted the Max Planck Society several times and in September 2007, presented the Society to the Board of County Commissioners. The Board conceptually approved funding for the Max Planck Society, contingent on matching funds from the State of Florida's Innovation Incentive Fund. The BDB also continued discussions with a major life science entity to bring a medical outpatient facility to Palm Beach County. The entity would also provide critical clinical trial and clinical research facilities.
- **Trade mission activities** in 2007 included hosting the Netherlands delegation in March, in collaboration with the World Trade Center and presenting life science opportunities to Enterprise Florida's representatives from the France, Benelux and United Kingdom offices. Finally, the BDB briefed the United Kingdom Trade & Investment team in April, focusing on the life science industry. Potential trade missions and joint projects were discussed.

WORKFORCE ALLIANCE, INC.

During the period October 1, 2006 to September 30, 2007, Workforce Alliance continued its work engaging and promoting the biotechnology industry in Palm Beach County and the greater Southeast Florida region. The Workforce Alliance accomplished this by:

1. targeting the industry as part of its mission to drive economic growth and build a pipeline of skilled talent,
2. addressing the goals of the U.S. Department of Labor Biotechnology Training Grant, and
3. fulfilling the deliverables of the BEST II grant from Workforce Florida.

During this period of time, the Workforce Alliance:

- Partnered with Enterprise Florida and the Business Development Board to promote Florida and Palm Beach County at the Florida pavilion at the BIO 2007 Convention.
- Participated as members of BioFlorida's Education and Annual Conference Standing Committees.
- Co-sponsored the BDB's Bioscience Stakeholders Meeting.
- Chaired the South Florida Bioscience Consortium's Workforce Development Committee.
- Sponsored *How To Start and Grow Your Life Science Business*, a seminar held in West Palm Beach at Workforce Alliance's Central Career Center.
- Co-sponsored the Enterprise Development Corporation's *Biotech 2007* Conference held at FAU in Boca Raton, FL and hosted a booth.
- Co-sponsored a seminar titled *The Biomedical Explosion and its Impact on Florida's Education System* organized by The Urban League Young Professionals of Palm Beach County and the Palm Beach Alumni Extension of the National Society of Black Engineers.
- Graduated 32 professionals from FAU's Biotechnology Certificate Program in the spring and summer of 2007.
- Placed 13 individuals from the Biotechnology Training Grant into positions in the life sciences. Three of our program participants are employed at Scripps. A new intern began at Scripps in August 2007.
- Provided \$137,890 in Employed Worker Training grants to bioscience companies in Palm Beach County.
- Provided skills testing to Scripps Florida's administrative applicants.
- Continued working with bioscience companies by providing talent for open positions.
- Participated in the Florida Life Sciences Roadmap meetings held throughout the state to help craft an analysis of the biotech industry in Florida.
- Funded the purchase of science materials for the Biotechnology Career Academy at Seminole Ridge High School.

- Provided work readiness training for sophomores and juniors at the Biotechnology Career Academy at Seminole Ridge High School.
- Provided an introduction of the bioscience industry to students during Career Day at Starlight Cove Elementary.

BIOFLORIDA

- Dr. Harry Orf, Vice President for Scientific Operations and Professor of Chemistry for The Scripps Research Institute-Scripps Florida, continues to sit on BioFlorida's Board of Directors and Executive Committee.
- BioFlorida's Education & Workforce Committee for 2007 was chaired by Dr. Harry Orf who led efforts for the 2nd Annual Bioscience Career & Education Exposition. The Expo placed scientists in high-school classrooms across the state, assisted teachers with their science curriculum and provided support materials on CD and DVD to explain biosciences and career opportunities in the industry.
- Ray Carpenter of Scripps Florida sat on the 2007 BioFlorida Annual Conference Marketing Committee, helping to market and promote the conference and industry primarily with outreach efforts.
- Dr. Richard Lerner, President of The Scripps Research Institute, opened BioFlorida's 10th Annual Conference and joined fellow institute presidents from Torrey Pines Institute for Molecular Studies and Burnham Institute for Medical Research on an opening Plenary Panel titled, "What's Next for Florida's Bioscience Investments." This panel discussion was well received by approximately 500 bioscience industry executives.
- Dr. Sukhvir Mahal, Scripps Florida's Department of Infectology and Dr. Claes Wahlestedt, Professor and Director of Neuroscience Discovery for Scripps Florida, sat as panelists at the BioFlorida 10th Annual Conference. Their discussion was in the Science Track, titled Molecular Pathogenesis.
- Also at the BioFlorida Conference, Peter Policastro, Senior Director of Business Development for Scripps Florida, was a panelist in the Business Track, titled Partnering & Licensing, which covered how to identify, develop and close successful partnership agreements. The session covered the latest trends in identifying the right partner for businesses, and offered advice when dealing with licensing, partnering and alliance management.

ENTERPRISE FLORIDA, INC.

- To date, nearly 600 companies specializing in biotechnology, pharmaceuticals or medical devices employ about 28,000 professionals. Ernst & Young ranked Florida as a Top 10 State for Biotechnology in 2006.
- Many international companies have discovered Florida's advantage as a life science hub. Japan's ASO Corporation, Sweden's Pegasus Airwave, Inc. and Germany's Oscor, Inc.

thrive in the state's business-friendly climate, low tax environment and multi-lingual, skilled workforce.

- The Milken Institute worked with Enterprise Florida, Workforce Florida and the Florida High Tech Corridor Council, along with 11 local and regional economic development partner, to assess the state's position since Florida began working two years ago to attract biomedical research and related commercial activity. The study, 'Florida Life Sciences Road Map' was published in June 2007 and is available at www.eflorida.com/lroadmap.
- Enterprise Florida's marketing message continues to center around the tagline: Florida. Innovation Hub of the Americas®. The tagline helps brand Florida as a state where innovative businesses thrive, as well as generate leads. Florida Life Science innovation stories are an integral part of the state's branding message.
- The branding message is promoted in Enterprise Florida's Life Sciences marketing efforts using various multi-media tactics, such as Special Advertorial Sections, Online eMarketing, Advertising, Radio and a physical presence at life science industry-related events.

Special Sections Include:

- A four-page special section titled 'Florida: A Rising Star in Life Sciences' ran in three life sciences publications, including *Nature* (May 3, 2007); *BIOforum Europe* (April 2007); and *Biotechnology International* (April/ May 2007).
- An article featuring Florida's bioscience boom, titled 'Nature Bioscience in the Sun,' appeared in *Nature* magazine in April 2007. The publication targets senior scientists and executives, and has a worldwide circulation of 60,500.
- The Biotech/ Pharma Communication Series eMarketing campaign included four email blasts. The campaign promoted the Life Sciences Market Brief, Industry Snapshot and Innovation Quarterly. It was distributed to approximately 40,000 industry executives throughout the year.
- The My eFlorida CRM System was developed to distribute the Innovation Quarterly newsletter, which includes life science-related news. The most recent issue of the e-newsletter was mailed to the database of more than 15,000 people.
- Life science-focused print ads appeared in the following publications: *Area Development*, *Bioscience in Florida*, *Business Facilities*, *Expansion Management* and *Site Selection*. All ads promote a website landing page that directs visitors to more information on eflorida.com.
- Radio sponsorship ads promoting the life sciences cluster can be heard nationwide on NPR programming (*Morning Edition*, *Talk of the Nation*, *All Things Considered*.)
- The Florida Pavilion at the BIO 2007 convention in Boston featured the Life Sciences Market Brief, in addition to a promotional piece including all pavilion sponsors. A thank-you email was sent to all pavilion visitors and invited them to sign up as My eFlorida members to receive further information about the life sciences cluster.

- Enterprise Florida sponsored the Early State Program of the Southeast BIO Investor Forum, a regional collaboration of public and private sector organizations involved in the life sciences industry. Sponsoring the program provided EFI several marketing opportunities, such as a life science print ad in the conference brochure, signage, event passes and attendee list. The event was in Atlanta in November 2006.
- Enterprise Florida updated the Life Science Market Brief to include a more detailed look at the cluster in Florida, including the size and location of the biotechnology, pharmaceutical, medical device and health care industries in the state. EFI also created the R&D Market Brief, which give an overview of the major research and development work performed around the state and highlight Florida's innovation landscape including research institutions, universities, key R&D investments in targeted sectors and emerging technologies.
- The redesigned eflorida.com website includes a detailed section about Florida's life sciences cluster, including information on Florida's four sub-clusters: Biotechnology, Medical Device Manufacturing, Pharmaceuticals, and Health Care. The site also highlights the state's R&D advantages, business climate and supporting infrastructure.