

**CAMDEN CITY HIGHER EDUCATION AND HEALTHCARE
INSTITUTIONS**

ECONOMIC IMPACT REPORT 2003

Submitted to

THE CAMDEN HIGHER EDUCATION AND HEALTHCARE TASK FORCE

Submitted by

The Roper Group in association with A. Ilan Consulting

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EXECUTIVE SUMMARY

The eight Camden City institutions participating in the Camden Higher Education and Healthcare Task Force (the institutions) are major economic contributors to the City of Camden, Camden County and the State of New Jersey. The operations of these institutions within the City of Camden (including CAMcare, Camden County College, Cooper Hospital, Our Lady of Lourdes Medical Center, Rowan University, Rutgers University, the University of Medicine and Dentistry of New Jersey and Virtua Health System) directly generate hundreds of million of dollars in wages and thousands of jobs in New Jersey annually. Most of this impact occurs in the City of Camden and its surrounding Camden County. The Task Force institutions also play a critical role in the daily life of the local community and as dynamic partners in the economic development of the City of Camden.

The direct contributions of the institutions in the City of Camden are enormous, with \$611 million in spending 7,224 employees, over \$360 million in wages and more than 8,800 students during Fiscal Year (FY) 2001. The academic institutions confer over 1,500 degrees each year with graduates joining the workforce as productive workers and community and business leaders. The healthcare component provides invaluable services with more than one-half million patient-visits per year. Some 91 percent of the institutions' employees are New Jersey residents. Over 55 percent of all employees reside in Camden County with nearly a thousand jobholders living in the City of Camden. As much as \$316 million of the institution's \$360 million payroll total was paid to New Jersey residents, with Camden County residents earning \$185 million and Camden City residents receiving \$23 million.

The eight institutions are also a key source for renewal. Capital investments at the institutions' various facilities in Camden City totaled more than \$27 million in FY2001 and are expected to grow to over \$120 million during the FY2003-2005-period. As a group, the eight academic and healthcare institutions rank as a leading employer in Camden City with 33% percent of all non-government jobs in the City. In Camden County, the institutions generate more direct jobs than the food manufacturing, printing, legal, real estate, information, finance & insurance, personal & repair services, transportation & warehousing and the durable goods wholesale sectors.

Although the institutions receive state funding, they derive most of their revenues from a variety of other sources including tuition, professional fees and research grants. On average, only 11 cents of every dollar spent by the eight institutions originated with the State of New Jersey in Fiscal-Year 2001.

The \$611 million in direct expenditures by the institutions represent only a part of their total impact. In actuality, the institutions' spending leverage even greater economic impacts on Camden City, Camden County and the entire state, as funds expended for labor, materials and services ignite a ripple effect that benefits nearly every sector in the New Jersey economy. This study shows that when the full multiplier effect of spending is

taken into account, the academic and healthcare institutions in Camden City have a substantial impact on the state's overall economy, and particularly within Camden County and the City of Camden:

- Nearly \$1.4 billion dollars in total spending were generated in the State of New Jersey as a result of the initial institutional expenditure of \$611 million in Fiscal-Year 2001.
- Total wages earned in New Jersey amounted to \$580 million, with \$360 million representing the Camden institutions' wages and the rest earnings by workers in various supplying industries throughout the state.
- The institutions' activities generated a total of 13,610 jobs (measured in full-time equivalents -- FTE) throughout the state, of which 6,350 FTE jobs were at the institutions.
- The bulk of these New Jersey impacts, including multiplier effects, were generated in Camden County, with \$959 million in total spending, \$422 million in wages and 8,506 jobs (FTE). The City of Camden is the focal point of these impacts.
- For each dollar in financial support by the State of New Jersey, the Camden institutions generated \$20.60 in total spending (economic activity) and \$8.60 in wages throughout the state's economy.
- The eight institutions' capital investments in FY2001 generated a total of \$62 million in spending and 524 construction-related jobs throughout the state. Investments planned for FY2003-2005 are expected to generate \$271 million in spending and 2,300 jobs in New Jersey.
- Total New Jersey state taxes generated from the eight institutions' operations in Fiscal-Year 2001 are estimated at \$53.8 million.
- Total New Jersey state taxes generated from investments in FY2001 are estimated at \$ 1.8 million. During the FY2003-2005 period the total figure is estimated at \$8.1 million, or \$2.7 million annually.
- Based on the 2001 data, for each dollar provided by the State of New Jersey in support of activities and programs at the eight institutions, eighty-two cents are recaptured by the State in the form of tax revenues generated annually. This is a conservative figure, not including other tax revenues from student and visitor spending.

As noted above, these substantial economic impacts capture only a part of the institutions' overall contributions. There are numerous other benefits, which are highly significant to the vitality of the City of Camden and its surrounding area. Medical

professionals, faculty members, administrators and other staff at the institutions have worked continuously to serve the local community in many ways. Their efforts have helped improve the quality of life in the community and promoted economic development. The presence of a dynamic academic and healthcare complex within the heart of Camden is a major economic asset that can continue to strengthen the City as a residential and business location. Among these contributions are:

- Provision of direct services to the community, such as job training, student preparation, employment services, family support programs, senior education programs, continuing education and use of school facilities by community groups.
- Provision of healthcare services, including medical services, emergency services, health education programs, crisis intervention, health screening and support for individuals with disabilities.
- Outreach programs to the community including a range of pre-college activities such as academic support services to students and faculty to increase retention and graduation rates, improve study skills and teacher training.
- Support to local businesses and financial institutions with small-business assistance programs and local bank deposits and investments, as well as through local spending by students and visitors on food, shopping and more.
- Strengthening the local labor pool and community leadership with graduates who are living and working in the Camden City area and elsewhere in the state.
- Attraction of grants to Camden.
- Development of new programs in response to needs of students and the community.

As the City of Camden battles for economic recovery and growth following many years of decline, it is expected that both the education and healthcare sectors will be central to this effort. In particular, the eight Task Force institutions will continue to be at the forefront, providing a strong economic base, new investments, community support and business support, to help meet future challenges and opportunities.

INTRODUCTION

This report describes and measures the economic impacts of the eight higher education and healthcare institutions within the City of Camden¹ on the State of New Jersey, and their contributions to the local economy of Camden City and its surrounding area. The analysis shows the direct effects of spending, employment, wages and taxes, and also quantifies the indirect and induced effects of the direct spending as it circulates through the local and state economy. This multiplier effect, stemming from the initial spending of the academic and healthcare institutions, benefits residents by creating jobs in many other sectors of the economy. In this report, institutional spending includes annual operating activities in Fiscal Year (FY) 2001. It also includes capital investments by the institutions for structures and equipment in FY2001 and those expected in the FY2003-2005 period.

The report also describes, in qualitative terms, the important ways in which the institutions contribute to the well being of the community and its economic development. These contributions include a diverse range of programs, projects and support activities, such as health services to the community, training and developing local labor, supporting community-based organizations and enhancing the perception of the City as a business location.

The economic development role of the Camden City institutions is particularly significant in light of the many economic challenges and needs facing the City of Camden. Decades of disinvestments and out migration have robbed the City of its vitality, leading to severe job losses and sharp declines in earnings. Even as Camden County's population grew during the 1990's by 1.2%, Camden City's population declined a further 8.7% to 79,904 by 2000. New Jersey's overall population grew 8.9% in the same decade.

In recent years, new investment in the City, in such projects as the Aquarium, Tweeter Center, River Sharks and the USS New Jersey Museum, are showing some promising signs for the future, but the City of Camden continues to require large, sustained investments and remains vulnerable to economic cycles. The eight higher education and healthcare institutions will be critical to Camden City's future development through their investments, the provision of services, spending programs and outreach activities in the local community.

The institutional expenditure and activity data for the study were obtained directly from the eight Task Force organizations. Quantitative data for the institutions were consolidated throughout the analysis to present an overall profile and economic impact results. Multiplier analysis is based on the RIMS II economic model obtained from the U.S. Bureau of Economic Analysis for the State of New Jersey and Camden County. Fiscal impact analysis is based on effective overall New Jersey tax rates that relate actual tax collections to wages.

¹ Including CAMcare, Camden County College, Cooper Hospital, Our Lady of Lourdes Medical Center, Rowan University, Rutgers University, the University of Medicine and Dentistry of New Jersey and Virtua Health System

The Higher Education and Healthcare Task Force

The Camden Higher Education and Healthcare Task Force consists of eight institutions within the City of Camden that have anchored the City over the years, bringing strength and support, and acting as an economic engine for stability and growth. Camden's healthcare institutions are tertiary care leaders in South Jersey, providing the most advanced procedures and services, including organ transplantation, the highest level of Trauma-Center, the highest level of neonatal intensive care service, medical and nursing training and more. Camden's higher education institutions provide a full range of academic learning opportunities to the entire community, especially to low-income, minority and bilingual individuals so they may become even more productive members of the workforce.

With their combined workforce of 7,224 employees, the institutions represented in the Task Force create a critical mass of significant dimensions within the City of Camden. As a group, the eight academic and healthcare institutions rank as a leading employer in Camden City with 33% percent of all non-government jobs in the City. In Camden County, the institutions generate more direct jobs than the food manufacturing, printing, legal, real estate, information, finance & insurance, personal & repair services, transportation & warehousing and the durable goods wholesale sectors.

Each of the eight institutions is unique in its mission, resources and capabilities. Through their diverse capabilities and the combined strength of their workers, they have played an important role in the development of their community. In particular, the close proximity of the institutions to one another creates a potential synergy within the area, which increases the number of possible ways resources may be combined to help mend the economic base of Camden City. A number of collaborations are already in place. (Details on each institution's programs and contributions appear later in the report).

DIRECT IMPACTS

The eight Camden institutions are intricately involved in the economic life of the City of Camden through their day-to-day financial expenditures and long-term investments. By channeling new spending streams into the hands of local area suppliers and service providers, the institutions and their employees affect the lives of nearly all City residents as well as the economy of Camden County and the State of New Jersey. The direct effects of the eight institutions, as employers, investors and buyers of materials and services from local vendors, is substantial:

Spending

Direct operating spending by the Camden City institutions on all their diverse requirements for labor, goods and services represents the first round of economic impacts in the analysis. These direct impacts give rise to the multiplier effect that boosts the overall impacts in various sectors of the economy, both locally and statewide. During FY2001, the eight Task Force institutions directly spent a total of \$611,422,000, with the vast majority of the spending going to in-state workers and vendors. The following shows the breakdown of expenditures between wages and all other expenses:

Table 1: Camden City Institutions Direct Operating Spending in Fiscal-Year 2001 (in \$1,000s)

EXPENDITURE CATEGORY	AMOUNT in \$1,000s
Wages	\$360,255
Materials and Services	\$251,167
Total	\$611,422

Source: Camden Higher Education and Healthcare Task Force

Although this quantitative part of the analysis focuses on the broad expenditure streams, it is important to keep in mind that these expenditures reflect the operations of hundreds of programs and institutional activities. They range from the teaching of the sciences, humanities, business, engineering and management, to the training of physicians and the provision of healthcare services. They capture dozens of outreach programs to the community as well as cutting edge research that benefits the entire state. The essence of many of these programs is described in more details later in the report.

Jobs and Payroll

The eight higher education and healthcare institutions are labor-intensive, reflecting their mission and the complexity of their daily operations. All together, in Fiscal-Year 2001, the institutions employed 7,224 people with a payroll of over \$360 million. The vast

majority of the institutions' employees, 91%, are New Jersey residents and 55% are residents of Camden County. Nearly 1,000 of the institutions' employees reside within the City of Camden. The following table provides details on both jobs and wages:

Table 2: Camden City Institutions' Employment and Wages in Fiscal-Year 2001

RESIDENCE	FULL-TIME EMPLOYEES	PART-TIME EMPLOYEES	TOTAL EMPLOYEES	TOTAL FTE* EMPLOYEES	WAGES (IN \$1,000S)
Camden City	773	182	955	864	\$23,033
Remaining Camden County	2,314	737	3,051	2,683	\$161,665
Remaining New Jersey	1,814	753	2,567	2,190	\$131,805
Out-of-State	575	76	651	613	\$43,752
Total	5,476	1,748	7,224	6,350	\$360,255

* Full-time equivalent. Assumes two part-time jobs equal one full-time job.

Source: Camden Higher Education and Healthcare Task Force

- Total employment at the eight institutions amounted to 7,224, with 5,476 full-time positions and 1,748 part-time positions. The Full-Time Equivalent (FTE) for all employees at the institutions was 6,350 in Fiscal-Year 2001.
- 91% of all employees are New Jersey residents. Over 55 percent of the institutions' employees reside in Camden County with 955 living in Camden City.
- Payroll totaled \$360 million, of which \$316 million was paid to New Jersey residents.
- Camden County residents received \$162 million of the New Jersey payroll total while Camden City residents received \$23 million.
- New Jersey State taxes withheld during FY2001 totaled \$6.3 million.

The direct employment and wage data described above provide the basis for the multiplier analysis, which generates the total economic impacts results.

Vendors

In addition to the institutions’ sizable expenditures for direct wage payments, a large portion of total operating expenditures goes to vendors of goods and services. The following table shows the dollar amounts received by New Jersey vendors from the institutions:

Table 3: Camden City Institutions’ Purchases from Vendors in Fiscal Year 2000 (in \$1,000s)

VENDOR LOCATION	AMOUNT
Camden City	\$12,765
Remaining Camden County	\$46,770
Remaining New Jersey	\$58,488
Out-of-State	\$133,144
Total	\$251,167

Source: Camden Higher Education and Healthcare Task Force. (Components partially extrapolated.)

- New Jersey vendors were major beneficiaries of Camden institutions’ spending for goods and services, receiving nearly half of the \$251 million total.
- Camden County vendors sold \$59.5 million in merchandise and services to the Camden institutions, with Camden City vendors accounting for \$12.8 million of this total.

The large dollar flow from institutional operations to local and statewide vendors in New Jersey assures that much of the economic and fiscal impacts on suppliers of manufactured products, wholesalers and service providers are captured and retained within the state.

Capital Investment

One of the most critical needs of the Camden economy has been, and continues to be, a steady stream of capital investments to revitalize the City’s capacity to meet future needs. The eight Camden institutions have been a central force in helping meet this need, and plans for the next few years show acceleration in the rate of construction. Capital

investments also benefit the Camden City area by generating short-term construction jobs, income and taxes.

- During FY2001, the eight institutions invested a total of \$27,266,000 in the construction of buildings, facilities and equipment (in addition to the operating expenditures reported above). These investments improve the efficiency of the schools and healthcare facilities and extend their capacity to deliver services in the long term. Work on these projects has generated a substantial number of short-term construction jobs, income for the local economy and tax revenue for the state.
- Initiatives are currently underway for further investments totaling \$119,775,000 in the FY2003-2005 period. These new investments will further strengthen the institutions' capacity to perform their basic mission and expand their contribution to the local community. During the construction period, the region will benefit from the additional economic activity generated from construction.

The economic impacts of these capital investments are not limited to the construction industry alone. Through the multiplier effect, numerous other industries throughout the state and the Camden region benefit from increased sales of materials and services, generating additional jobs, income and tax revenues.

TOTAL IMPACTS

The initial round of spending by the Camden Task Force institutions sends a ripple effect throughout the local and state economy. Institutional expenditures on payrolls and vendors are in turn spent by wage earners and the suppliers, leading to additional rounds of spending and purchases within the area's economy. Each round generates new economic activities creating additional jobs, income and tax revenues. The multiplier effect captures all the rounds of this ripple effect within the area's economy.

Methodology

The traditional method of measuring total economic impacts is by use of multiplier analysis, which adds two components to the direct effects -- the indirect effect and the induced effect. The indirect effect traces the direct spending for goods and services by institutions to their suppliers where additional economic activity is generated. The induced effect traces the spending by wage earners at the institutions and their suppliers, again generating new activities in a variety of industries.

The multiplier effect is expressed as the ratio between the resulting total spending in the area's economy (direct, indirect and induced) and the initial direct spending by the institutions. Thus, a multiplier of 2 means that for every dollar in direct spending, there is an additional dollar generated in indirect and induced spending within the impact area. The same concept holds for wages and jobs multipliers.

To estimate the multiplier effect, this study utilizes the RIMS II Model of the U.S. Bureau of Economic Analysis, which was specifically estimated for the State of New Jersey and for Camden County. The model is based on the Input-Output method, which depicts the structure of sales and purchases throughout all sectors of the economy.

Detailed expenditure data provided by the Camden Task Force for the eight Camden higher education and healthcare institutions were regrouped and applied to the appropriate RIMS II multipliers, taking into account spending that occur outside the state. The results of the model analysis show the total spending impacts, total earnings and total employment in New Jersey and in Camden County. In addition, tax revenues by the state are estimated using effective tax rates as applied to total earnings generated in the New Jersey economy by the institutions. Annual operating expenditures and capital investments are analyzed separately.

Total Impacts from Operations of the Camden Task Force Institutions

The full effects of spending by the eight Camden institutions are felt throughout the Camden area and the New Jersey state economy, as industry after industry receives payments for goods sold or services rendered to the institutions or their employees. Even further down the line, other New Jersey suppliers, who do business with the Camden

institutions’ direct suppliers, also benefit from such economic transactions. When all the rounds of spending that cascade through from sector to sector, the total impact of the Camden Task Force institutions in the State of New Jersey and in Camden County was found to be substantial. The following table summarizes the results of the multiplier analysis using the RIMS II economic impact model:

Table 4: Total Economic Impacts in New Jersey and in Camden County from Camden City Institutions’ Operating Expenditures in Fiscal-Year 2001 (in \$ millions)

IMPACT CATEGORY	DIRECT EFFECTS	TOTAL IMPACTS IN NEW JERSEY	TOTAL IMPACTS IN CAMDEN COUNTY
Economic Activity (Spending)	\$611.4	\$1,388.4	\$959.1
Wages	\$360.3	\$579.5	\$422.5
Jobs (FTE)	6,350	13,610	8,506

Source: Camden Higher Education and Healthcare Task Force; Bureau of Economic Analysis RIMS II Model

The results show that:

- A total of \$1.388 billion dollars in spending was generated in the State of New Jersey as a result of the initial expenditure of \$611 million by the Camden City institutions in Fiscal-Year 2001.
- Total wages earned in New Jersey amounted to \$579 million, with \$360 million representing direct wages at the Camden City institutions and the rest earnings by workers in various supplying industries throughout the state.
- The eight institutions’ activities generated a total of 13,610 jobs (measured in full-time equivalents) throughout the state, of which 6,350 jobs were at the Camden institutions.
- The bulk of these New Jersey impacts, including multiplier effects, were generated in Camden County, with \$959 million in total spending, \$422 million in wages and 8,506 jobs. The City of Camden is the focal point of these impacts.
- For each dollar in financial support by the State of New Jersey, the Camden institutions generated \$20.60 in total spending (economic activity) and \$8.60 in wages throughout the state’s economy.

Total Impacts from Camden Institutions' Investments

In addition to the annual impacts resulting from the eight Camden institutions' operations, capital investments for construction of new facilities generate short-term benefits in the construction sector and other industries that supply goods and services to it. These impacts occur during the construction period as well as in the preparation phase prior to construction. Applying the multiplier effect, these impacts are measured by total economic activity, wages and jobs. The following table highlights the total impacts of the institutions' investments during FY2001 and in the FY2003-2005-period:

Table 5: Total Economic Impacts in New Jersey from Camden City Institutions' Investments in FY2001 and during FY2003-2005 (in \$ millions)

IMPACT CATEGORY	TOTAL IMPACTS IN FY2001	TOTAL IMPACTS IN FY2003-2005
Direct Investment	\$27.3	\$119.8
Economic Activity (Spending)	\$61.6	\$270.6
Wages	\$18.1	\$79.7
Jobs (in person-years)	524	2,300

Source: Camden Higher Education and Healthcare Task Force; Bureau of Economic Analysis RIMS II Model

The results show that the \$27 million spent by the institutions on new capital programs during in FY2001 produced 524 person-years of employment in the New Jersey construction sector and in related industries throughout the state. This includes the many suppliers, which provided materials for construction, and architectural and financial services for specific projects. Statewide economic activity related to this capital spending totaled \$61.6 million, and wages earned by workers totaled \$18.1 million.

Capital investment initiatives by the eight institutions for the FY2003-2005 period show an accelerated construction program with a total of \$119.8 million. The expected job generation in the construction-related trades and throughout New Jersey is estimated at 2,300 person-years. Total economic activity related to this capital program in New Jersey is estimated at \$270.6 million, and total wages at \$79.7 million.

It is important to note that while the construction impacts are short term, the positive effects of the investments on long-term operations can be quite substantial by expanding and revitalizing academic and healthcare programs.

Fiscal Impacts

As shown in the prior section, the Camden City institutions are major generators of economic activity, income and jobs for New Jersey, with much of this impact occurring in Camden County and the City of Camden. Another important contribution of these operations and investments is the creation of tax revenue for the State of New Jersey. For example, university and hospital employees pay income tax on their earnings and sales taxes on their retail spending. Suppliers of goods and services pay business taxes and other fees while their workers also pay income and sales taxes.

To estimate the overall tax impacts, the appropriate effective tax rates (based on actual statewide tax collections relative to actual statewide wages) for New Jersey were applied to the total wage amount generated by the institutions. The results of this analysis show the following tax impacts:

- Total New Jersey state taxes generated from the operations of the eight Camden city institutions in Fiscal Year 2001 are estimated at \$53.8 million.
- Total New Jersey state taxes generated from investments in FY2001 are estimated at \$1.8 million. During the FY2003-2005 period the average annual figure is estimated to rise to \$2.7 million annually, for a total of \$8.1 million.
- Based on FY2001 data, for each dollar provided by the State of New Jersey to the institutions in support of their activities, 82 cents are recaptured by the state treasury in the form of tax revenues generated each year. This is a conservative figure, not including other tax revenues generated from student and visitor spending.

In addition to state taxes, the Task Force institutions also generate millions of dollars in local property taxes in Camden County and other New Jersey counties. These taxes are paid by institutional workers residing in New Jersey and by employees of the institutions' suppliers also residing in the state.

CONTRIBUTIONS TO THE CAMDEN COMMUNITY AND ITS DEVELOPMENT

The economic contributions of the Camden Task Force institutions, as captured in the multiplier analysis above, show only a part of their overall impact. The sum of the institutions' impacts on the local community is much greater. Day-by-day, through their many educational, outreach and support programs, and through the efforts of their employees and students, the Camden institutions also make critical contributions to the community and to overall regional economic development. Chief among these are:

- Provision of direct services to the community, such as job training, student preparation, employment services, family support programs, senior education programs, continuing education and use of school facilities by community groups.
- Provision of healthcare services, including medical services (a total of 533,298 patient-visits in FY2001), emergency services, health education programs, crisis intervention, health screening and support for individuals with disabilities.
- Outreach programs to the community including a range of pre-college activities such as academic support services to students and faculty to increase retention and graduation rates, improve study skills and teacher training.
- Support to local businesses and financial institutions with small business assistance programs and local bank deposits and investments, as well as through local spending by students and visitors on food, shopping and more.
- Strengthening the local labor pool and community leadership with graduates who are living and working in the Camden City area and elsewhere in the state.
- Attraction of grants to Camden.
- Development of new programs in response to needs of students and the community.

While such contributions often do not lend themselves to quantification, it is clear that they make a difference in Camden City's long-term economic growth prospects. This is particularly significant in the area of human capital development and the preparation of young people for the jobs of tomorrow, as well as working directly with government and businesses to meet social and economic goals to the benefit of all residents.

Many of these efforts represent collaborations among the institutions. For example, a joint program among Lourdes Medical Center, Cooper Hospital, Camden County College and Camden County on a NJDOL Upward Career Mobility grant provides for training unemployed residents for entry-level positions by the County for placement at the

hospitals. At the same time, Camden County College helps train existing entry-level employees at Lourdes and Cooper to assume higher-level positions creating vacancies for the newly trained unemployed residents.

With 8,843 students, a staff of 7,224, and over 1,500 degrees and certificates awarded annually, the institutions and their alumni strengthen the talent and know-how of the local labor pool, a necessary component of a sound economic development strategy.

The numerous programs and activities offered by the eight institutions in support of the community could not be described in detail within this report. However, the following description of some of the key programs and activities at each of the eight institutions² provides insights into their community involvement and their contributions to local economic development. It must also be recognized that, taken as a group, the very presence of this major accredited academic and healthcare complex within Camden City is a major economic asset, which provides a critical mass in building its perception as a desirable business location and attracting new investment:

CAMcare Health Corporation

CAMcare Health Corporation has been in existence since 1978 providing services to the community of Camden City and Camden County. As a federally qualified health center, the organization provides primary health care services in Pediatrics, Adult Medicine, Obstetrics and Gynecology, and General Dentistry at five conveniently accessible locations. CAMcare has many affiliations in the community, which promote the integration of health services in the City of Camden for all age groups. CAMcare is the largest single provider of primary health care in Camden, serving one in four residents.

The mission of CAMcare Health Corporation is to provide comprehensive health services to underserved families in the City of Camden and its environs. Its programs and initiatives aim to have a positive impact on the health status of individuals in the community and to improve the overall health levels in the City of Camden given the limited access to medical and dental providers in the City. CAMcare works collaboratively with all available community resources to coordinate the delivery of comprehensive services.

In FY 2002, CAMcare provided 91,246 primary medical and dental health services to 23,282 users. CAMcare's most centrally located site at 3 Cooper Plaza, a 13,636 square foot facility in close proximity to Cooper Medical Center, accounts for the largest number of visits (33,756). Over time, the facility has become extremely cramped with the addition of a triage-nurse and Fast-Track suite and other ancillary services to the existing OB/GYN, pediatrics and internal medicine activities within the same facility. The problem continues despite major efficiency improvements and extended evening and weekend hours at the site.

² Text provided by the institutions, with some editing.

CAMcare proposes to increase access to its services for the underserved by relocating its central site to a new facility -- the Gateway Center -- a three-story state-of-the-art health care facility, to be constructed 1 1/2 blocks from the present site. It is anticipated that the Gateway Center will serve over 4,000 new users (1,405 who are under-insured or uninsured) over the next two years and provide over 500,000 patient encounters over the next 10 years. CAMcare has secured financing in excess of \$5 million for the Gateway Project.

Camden County College in the City of Camden

Camden County College's service to the City of Camden began more than 30 years ago with one program in a rented storefront. Today, CCC's urban campus covers two blocks at Broadway and Cooper Street and offers a comprehensive array of academic and career programs as well as cultural opportunities for citizens of the city and surrounding communities.

As a primary partner in Camden's revitalization, the college has developed many education-based initiatives to strengthen the urban middle class. Students at the Camden City Campus can study for degrees and certificates in numerous fields, including health careers such as nursing and medical coding.

The Camden City Campus also serves residents already in the workforce through its customized training programs for area businesses and government agencies. College activities serving middle and high school students include youth summits, mathematics competitions, Tech Prep, the Health Career Opportunities Program and Upward Bound. The Integrated English Literacy and Civics Education Program helps residents with limited English proficiency become better informed parents, workers, and community members. The new Gateway Community Project, conducted at churches and community centers throughout the city, offers low- or no-cost GED, English as a second language and adult basic skills instruction. After completing community-based courses, Gateway students move on to the Camden City Campus to continue their college studies or workforce preparation.

Of the nearly 2,000 students enrolled at the Camden City Campus each semester, half live within the city limits and three-quarters are African-American, Hispanic, or Asian. Because the college serves residents in the city and also brings in non-residents from the surrounding communities, businesses located near the campus maintain a constant flow of potential customers.

The five-story College Hall – the first permanent Camden City Campus structure – was built in 1991 and has 40 classrooms, a community meeting room, a student lounge, and a childcare center. The newly opened, eight-story Camden Technology Center adds 278,000 square feet of learning, gathering, retail, and parking space. The University District Bookstore, which is housed inside the Tech Center, serves students from CCC, Rutgers University and Rowan University as well as the public. Other amenities include

technologically “smart” classrooms, fully wired conference rooms and an “electronic village” computer lab, all of which will help the campus more than double its current enrollment to 5,000-plus students.

These latest initiatives afford Camden County College with the opportunity to provide even further opportunities to the people of the City of Camden.

Cooper University Hospital

Cooper University Hospital is the premier provider of comprehensive health care and the regional referral center for advanced tertiary-level health care services in southern New Jersey. As the clinical and core teaching campus for the University of Medicine and Dentistry of New Jersey/Robert Wood Johnson Medical School in Camden, Cooper has become a national leader in medical education and research. For patients, that means the widest array of clinical services in Southern New Jersey with a full continuum of primary and tertiary care, innovative diagnosis and treatment options with access to cutting-edge research and protocols.

Cooper has a long-standing commitment to the City of Camden over its 117-year history. The Cooper Health System remains committed to basing its flagship regional tertiary-level hospital in Camden where Cooper University Hospital continues in its role as the premier regional university hospital serving South Jersey.

Among Cooper’s *Centers of Excellence* are the *Cooper Heart Institute*, *The Cooper Bone and Joint Institute*, *The Cancer Institute of New Jersey at Cooper University Hospital* and *the Children's Regional Hospital at Cooper*. Cooper also has the only *Level I Trauma Center* in Southern New Jersey that is part of Cooper's expansive network of tertiary and critical care services. Cooper is also known as the regional provider of perinatology and neonatal intensive care services, caring for the region’s most vulnerable and premature infants and women in need of high-risk maternity services. Cooper has had outstanding success in recruiting world-class physicians who are international leaders in their fields in cardiology, critical care medicine, orthopaedic surgery, and radiation oncology. Cooper has also experienced exponential growth in clinical research and grant funding through The National Institutes of Health.

Cooper not only offers area residents quality health care services, but also provides outstanding employment and educational opportunities. As the largest private employer in the City of Camden, Cooper University Hospital provides a range of employment opportunities for city residents. In addition, Cooper works closely with local community groups to identify candidates for possible employment. Cooper also partners with the Camden School District and the Brimm Medical Arts School to provide internships in the health sciences for high school students.

Throughout the year, Cooper employees support a number of programs that help Camden's residents of all ages. Cooper holds a "Back to School Drive" where employees

donate thousands of pencils, pens, notebooks and other school items for students who need supplies during the school year. Cooper employees also raise thousands of dollars to provide new coats that are distributed to the families of needy Camden school children. Various food drives provide nourishment that families need to stay strong. Through Cooper's community health education department, Cooper staff also provides free screenings for hypertension, cholesterol, diabetes, blood pressure and asthma in numerous community centers, churches and health fairs in the City of Camden and South Jersey region.

Our Lady of Lourdes Medical Center

Our Lady of Lourdes Medical Center (OLLMC) has touched the lives of Camden residents for over 50 years. One out of every three Camden residents comes to OLLMC for their inpatient care, and one out of every ten employees live in the city.

OLLMC serves as a regionally renowned referral center for advanced services such as Cardiology, Dialysis and Organ Transplantation, Neo-natal Care and Rehabilitation, while also serving as an essential provider of primary care and outreach services to the poor and underserved. The Osborn Family Health Center alone conducts 45,000 visits annually in the areas of Obstetrics and Gynecology, Pediatrics, and Family Practice.

Some of OLLMC's hard-won accomplishments include: decreasing the infant mortality rate in the City of Camden from 3.2 % to 0.6 % for those who receive prenatal care; a nationally recognized teen drop-in program that serves over 50 teens per session; a Senior Companion program that employs 80 volunteers to serve as companions to 320 seniors in need of respite care; a Foster Grandparent program in which 80 seniors serve as foster grandparents to 320 youth; and a homeless outreach program that serves approximately 1,700 homeless yearly. These programs helped OLLMC win the Foster G. McGaw Award for Community Service in 1995.

To continue the commitment to the City of Camden, OLLMC is making an investment of over \$50 million by constructing a 121,000 square foot Critical Care Building. The Emergency Department (ED) will go from 18 to 34 treatment spaces (an 80% increase), to significantly reduce wait times for emergency medical service. Critical Care will go from 22 to 42 beds (a 90% increase) and Critical Care Stepdown beds will go from 12 to 34 (a 180% increase) to help reduce the frequency of diverts because of full beds. There will be 4 new state of the art surgical and procedure rooms, and finally, the new School of Nursing (SON) will help with the critical shortage of Registered Nurses that exists both nationally and in our region.

The project will expand the vital partnership with the community to improve health outcomes. Economically, it will create approximately 150 new jobs (consisting of 31 in the ED and SON with 119 throughout the rest of the building). OLLMC is proud to be part of the team of institutions and developers who believe that an investment in the City of Camden enhances both the city and the region.

Rowan University in the City of Camden

Active in Camden since 1969, Rowan University has provided educational services for the community with the opportunity to achieve an undergraduate degree. Approximately 500 undergraduate students are enrolled each semester in day and evening programs. Over 600 graduates are now employed in professional positions including public school and daycare teachers, government, social and community service organizations and private business.

A unique program of Rowan at Camden, operating since the origin of the campus, is E.S.L. (English as a Second Language). The program provides Camden non-native speakers the opportunity to study English, improve their language and academic skills, and take college courses.

In collaboration with the Camden Board of Education, the campus operates a Preschool during the day for 30 three and four year old children. In the afternoon, children take part in an after school program with educational enrichment activities and programs.

For over twenty years, the university has operated a rewarding pre-college program C.H.A.M.P. (Creating Higher Aspirations and Motivations Project). Students from the Camden school district participate in after school tutoring, counseling and mentoring, as well as Saturday field trips to colleges and universities. PSAT, SAT, GEPA and HSPA instruction is provided in addition to individual assistance to graduating seniors with college applications and financial aid forms. During the summer students participate in a six-week enrichment program to acquaint them with natural and environmental studies as well as campus life.

The campus sponsors a Neighborhood Technology Center for the residents of Camden. Through personal donations of computers and printers, city students and seniors repair and restore old systems and eventually use them for educational advancement. The computers are placed in the City library, Community Senior Centers, and local churches throughout the city or given to families with school age children in an attempt to reach many residents of the City.

The Camden Campus student organizations also serve the local community by hosting holiday dinners and toy drives for the residents of the Anna Sample House, a homeless shelter for women and children. The members of the organization also routinely visit the Woodland Senior Care Center and Cooper Hospital Pediatric Unit to read to the residents.

As a part of the Camden Rehabilitation and Economic Recovery Act, Rowan University is expanding its presence in the city with the construction of a new academic building. The new facility will be located on Cooper Street in the University District. The new facility will allow the Camden Campus to double its student capacity to 1,000 and

broaden its academic programs to meet the ever-changing needs of the region, as future funding permits.

Rutgers University - Camden

Rutgers-Camden traces its roots back to 1926, with the creation of its predecessor institution, the South Jersey Law School, and then the College of South Jersey in 1927. These entities joined Rutgers, The State University of New Jersey, in 1950.

As the southernmost campus of New Jersey's flagship state research university, Rutgers-Camden offers 34 undergraduate majors and 13 graduate and professional programs to approximately 5,700 students. There are approximately 30,000 Rutgers-Camden graduates, many employed in leadership positions in business, law, government, health care, teaching, research, public service, the judiciary, and many other areas, both in New Jersey and across the nation.

The campus encompasses 40 acres, including on-campus student housing, athletic playing fields, and numerous facilities for research, teaching, service, and administrative functions.

Rutgers-Camden's commitment to its host city and state is clear and compelling. For many years, Rutgers has collaborated with its neighbors to provide literacy training, small business guidance, public policy insight, pro bono legal service, health care assistance, athletic facility usage, and much, much more.

Throughout the year, Camden children and teenagers engage in uniquely tailored arts education programs offered through the Rutgers-Camden Center for the Arts. The Rutgers-Camden Small Business Development Center, a function of the U.S. Small Business Administration, provides free business counseling to Camden residents seeking to start their own businesses. Various programs, such as the Science Preparation Alliance of Rutgers and Camden, help the city's children gain a competitive edge in their pursuit of careers in health care, the sciences, and other disciplines. The Senator Walter Rand Institute for Public Affairs delivers policy guidance to citizens and city leaders alike. As a final example, students in the LEAP (Leadership, Education And Partnership) Academy charter school program enjoy an unparalleled relationship with Rutgers through the university's close relationship with the pre-K through 12 school.

These are but a few examples of the programs that will continue and grow, thanks in no small part to the state's investment in Rutgers through the Rehabilitation and Economic Recovery Act, which will allow the university to build a \$31 million law school facility that will house an expanded portfolio of pro bono clinical service programs in such areas as domestic violence, immigration law, elderlaw, tax assistance, bankruptcy, dispute resolution, and more. These programs will predominantly serve Camden citizens who otherwise would not be able to avail themselves of crucial legal guidance.

The Rutgers Board of Governors approved the law school construction project at its April 8, 2004, meeting. Construction is expected to begin during summer 2005, with occupancy anticipated for 2007. Rutgers also will explore the construction of additional graduate student housing for students at Rutgers, Rowan, and Cooper/Robert Wood Johnson.

The presence of this state-of-the-art facility will have a galvanizing effect on the University District. The influx of new students will build a critical mass for the city's downtown area which will attract retailers and other business entities that will pay taxes, maintain existing structures, build new structures as needed, and employ Camden residents. This model has been tested and proven successful in urban areas nationwide, most notably with the University of Pennsylvania and Drexel University in Philadelphia's University City.

Economically, this expansion is expected to attract 55 permanent new jobs, as well as numerous construction and other labor-related jobs.

Virtua Health

Virtua Health, the largest healthcare provider in South Jersey, is a non-profit organization dedicated to providing the highest quality health care to the communities it serves. As one of those communities, Camden City and its residents benefit from the comprehensive health and social services offered through the Virtua Health Camden Campus.

Through its own healthcare services and partnerships with other community organizations, Virtua Camden addresses the needs of Camden residents with easy access to services. This is especially beneficial to the elderly and those who depend on public transportation.

Virtua's Kyle W. Will Family Health Center provides comprehensive primary care and specialty services including podiatry, ophthalmology, gastroenterology, cardiology, obstetrics and gynecology, physical therapy and wound care. The Family Health Center also gives residents the opportunity to choose their own board-certified physician or certified nurse practitioner. These services are extremely valuable to the Camden community and the available choices empower residents to take an active role in their health care. In addition, the Virtua Emergency Center at Camden provides 24-hour emergency care.

Virtua's Evans-Wisniewski Dental Center offers affordable dental care, including services from routine emergencies and examinations to gum surgery and limited orthodontics in a state-of-the-art environment.

Virtua at Work Occupational Health Services delivers care to more than 2,000 Camden City workers including police and firefighters and more than 40 companies throughout Camden and its surrounding communities.

Day care services are available so residents can go to work with the confidence of quality care for their children. For children with special needs, the Providence Medical Day Care program provides day care for children with a wide range of disabilities. For those residents seeking care for elderly family members, Virtua's campus includes the Senior Care of America day care program.

To help residents find employment and job training, Virtua Camden has partnered with several organizations including the Genesis School of Business, Community College of Philadelphia and Camden County College Consortium. Camden residents can also access behavioral support through the Virtua Alcove addiction and chemical dependency treatment program, Virtua's Children Achieving Success Through Therapeutic Life Experiences (CASTLE) program and the Brookfield Elementary School.

Virtua Camden continues to evolve and flourish as a new model for healthcare providers in an urban setting. By seeking strategic partnerships with organizations, programs and companies it helps the residents of Camden build a solid future for themselves and their children.

University of Medicine and Dentistry of New Jersey - Camden

UMDNJ, New Jersey's public university of the health sciences, has been a vital presence in Camden since the early 1970's. Today, the University's Camden campus has grown to offer a range of programs and services through the various schools of the University, namely, University Behavioral HealthCare, School of Health Related Professions, School of Public Health, School of Osteopathic Medicine, Robert Wood Johnson Medical School, New Jersey Dental School and the School of Nursing. In addition to the many programs and services that continue to operate in Camden, there are currently 210 students enrolled with a total of 1,223 faculty and staff.

The University's Robert Wood Johnson Medical School at Camden has a clinical campus adjacent to Cooper Hospital/University Medical Center, its major teaching hospital. More than twenty Camden-area organizations are affiliated with UMDNJ, including the Coriell Institute for Medical Research and Our Lady of Lourdes Medical Center. In addition, UMDNJ-School of Public Health's South Jersey programs is offered through its Stratford/Camden campus, many in conjunction with Rutgers Camden.

University schools and units are also key components for many initiatives serving the needs of the Camden community. For example, Robert Wood Johnson Medical School-Camden provides a number of free medical services to the community through its Urban Health Initiatives Program. Specifically, medical students operate the HOP clinic at the LEAP Academy Health Center to provide free medical care to uninsured Camden residents. Students staff all aspects of the clinic and follow from one to three patients in continuity as part of their student learning experience. Medical students also volunteer to teach CPR and first-aid in schools, day care centers and churches throughout the city. They also teach a comprehensive family health curriculum for kindergarten through ninth

grade students at LEAP Academy and provide after-school mentoring to students at the Morgan Village Elementary School in Camden.

Dental care for HIV/AIDS patients and other underserved populations is one of the missions of the Clinical Affairs Division of UMDNJ's New Jersey Dental School in Camden. The division also sponsors educational outreach programs on a range of health issues in Camden schools, PTA meetings, health fairs and other community events. In addition, the Dental School also provides dental services to residents of the Meadowview Nursing Facility.

The University Hospital, UMDNJ's flagship teaching hospital in Newark, provides emergency transportation and ambulance services to the City of Camden. Emergency medical coverage is also extended to several points of interest in the city such as the Tweeter Center, the New Jersey Aquarium in Camden, Battleship USS New Jersey.

UMDNJ's School of Nursing has spearheaded collaborations with the city's health and human service providers to develop the Church Nurses Program, designed primarily for non-medical professionals. The program offers training in basic first aid, disease recognition, primary prevention, basic skills and health promotion. More importantly, it also provides referral services for these first-line church nurses from various faith-based organizations and to healthcare providers.

The School of Nursing also operates a primary healthcare center in the offices of the Camden County Council of Economic Opportunity, Inc. Staffed with an advanced practice nurse and a registered nurse, the center offers primary and secondary health screenings and health education and referral services to families in the community.

UMDNJ's School of Osteopathic Medicine has adopted the Charles Brimm Medical Arts High School, where emphasis is on careers in the healthcare arena. University faculty members and medical students work closely with the school and sponsor campus tours, lectures, and regularly use the University's medical library. Additionally, SOM in collaboration with Our Lady of Lourdes Medical Center, Volunteers of America and the School of Nursing, provides primary healthcare to Camden's homeless and indigent population.

The School of Health Related Professions Respiratory Therapy and Physical Therapy programs participate in Respiratory Therapy and Physical Therapy faculty participates as a partner in the SOM Scholars Program, the Science Preparation Alliance of Rutgers and Camden (SPARC) Allied Health Sciences Expo and Charles E. Brimm Medical Arts High School.

UMDNJ facilitates the Camden City Healthy Futures Committee that has been charged with sustaining an effective healthcare delivery network in the city. The committee coordinates member outreach efforts and helps build healthcare collaborative networks to make improved a health an integral part of the city's ongoing revitalization efforts. Member organizations represent government, academia and the private sector.

CONCLUSION

This economic impact report clearly demonstrates that the eight Camden Higher Education and Healthcare Task Force institutions are critical contributors to the well being of Camden City and its region, and make a significant impact on the economy of the State of New Jersey. The institutions achieve this on two levels: they inject large and measurable streams of dollars into the local and state economy; and, they are active long-term partner in the economic development of its community.

The findings of this report show that the Camden City academic and healthcare institutions have a nearly \$1.4-billion dollar impact on the state economy, affecting numerous sectors throughout the state and generating a substantial number of jobs, income and taxes, directly and through the ripple effect of their spending. The Camden City institutions' combined impact at the local level is highly pronounced as they represent over one-fourth of the City's direct jobs and constitute one of the largest employment bases in Camden County.

At the same time, the study demonstrates that these eight institutions, through their many educational services, health services, outreach programs and community activities, makes critical contributions to the life of community residents and to the overall economic development efforts in Camden City and its surrounding area. Furthermore, the presence of these institutions helps attract new investments and businesses to Camden.

The higher education and healthcare institutions of Camden City expect to continue to play an important role in the community and the economy of Camden City, helping to sustain the ongoing economic renewal efforts following decades of economic setbacks,