

APPENDIX I

Nevada Governor's Office of
ECONOMIC DEVELOPMENT

Bob Potts
Research Director
Nevada Governor's Office of Economic Development

Bob Potts is the Research Director for the Nevada Governor's Office of Economic Development, bringing to the position more than 20 years of experience in data research and analysis. Specializing in data collection and dissemination, economic impact analysis, statistical modeling and survey research, Mr. Potts is considered a leading expert in the business and economic environment for the state of Nevada. In his position, Mr. Potts oversees the collection, analysis and reporting of business, socioeconomic and performance information to aid the GOED in the development and diversification of Nevada's growing economy.

Before joining the GOED, Mr. Potts served as the Assistant Director for the Center for Business and Economic Research at the University of Nevada, Las Vegas. While there, he assisted as the university representative and consultant to the business and government communities on local, state, national and international economic trends and business climate. During his tenure as Assistant Director, Mr. Potts designed and maintained the Center's data warehouse, survey systems and Web sites. In addition, he made regular presentations on the economy and was a resource for media organizations. His work has been published in *Las Vegas Perspective*, *Nevada Business Magazine*, *Economic Outlook*, *Southern Nevada Business Directory*, *Southern Nevada Factbook*, *Southern Nevada Business Confidence Index* and *Southern Nevada Index of Leading Economic Indicators*.

Mr. Potts earned a Bachelor of Science degree in Animal Science from Montana State University and a master's degree in Business Administration from the University of Nevada, Las Vegas. As a graduate assistant at UNLV, Mr. Potts co-authored four professional journal publications and developed six regularly released socioeconomic, statistical and business publications.

Health Care Employer Survey
Nevada Health Care Workforce Summit

April 8, 2014

Nevada Governor's Office of

ECONOMIC DEVELOPMENT

Background

Developing a Strategic Plan for the Health Sector

- Available Secondary Information
 - 105,686 jobs in 2013
 - Adding 33,152 in the past 10 years or a 46% growth rate compared to the nation at 25%
 - It was the only sector that didn't decline during the recession
 - Average wage of \$62,793 compared to the nation at \$59,042
 - 75% of the workforce is female
 - It has a jobs multiplier of 1.86
 - Industry concentration is only 2/3's of the nation
 - Listing of all the health related businesses in Nevada

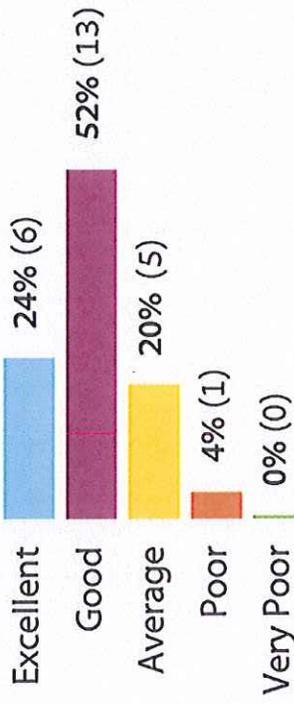
Background

Developing a Strategic Plan for the Health Sector

- Unavailable Sentiment Information
 - The existing business climate
 - Workforce issues
 - General business demographics
 - Expansion plans
 - Exporting activity
- Survey instrument
 - Presented to the Industry Intelligence Committee and then to the Health Sector Council.
 - Pilot survey of 28 questions sent to members of the Nevada Hospital Association.
 - There were 58 hospitals surveyed with responses from 25 for a 43 percent response rate.

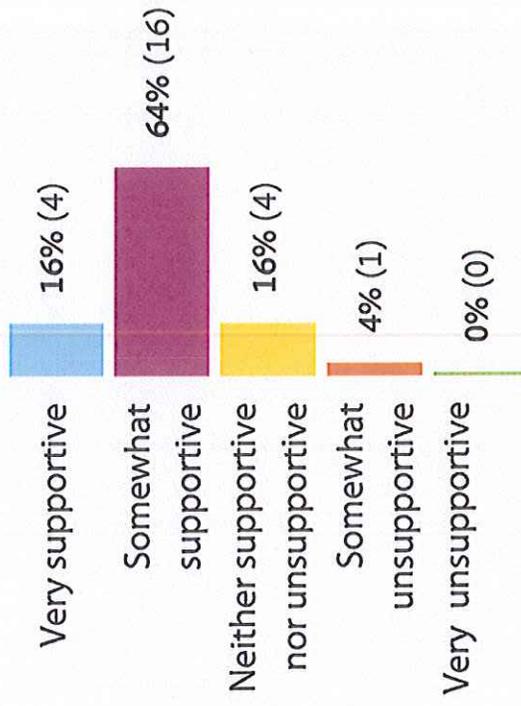
Key Findings: Business Climate

1. What is your overall opinion of Nevada as a place to do business? (select only one)



* 25 total responses, 100% of submissions

2. In general, how would you rate Nevada's support of business owners?



* 25 total responses, 100% of submissions

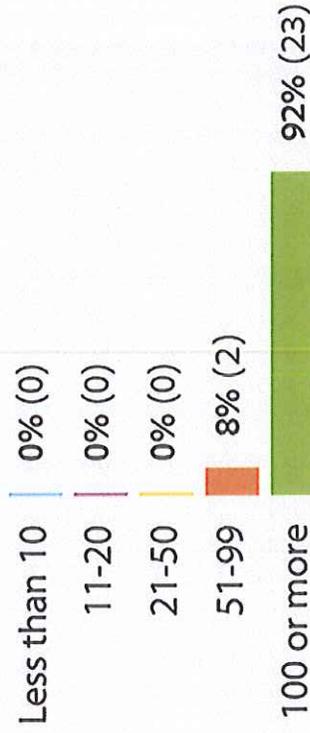
Key Findings: Business Demographics

5. How long has your business been operating in Nevada?



* 25 total responses, 100% of submissions

6. How many employees currently work at your Nevada location?



* 25 total responses, 100% of submissions

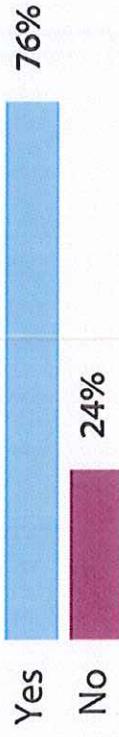
Key Findings: Plans

8. Are you planning to modernize, renovate, or expand your Nevada business in the next 12-18 months?



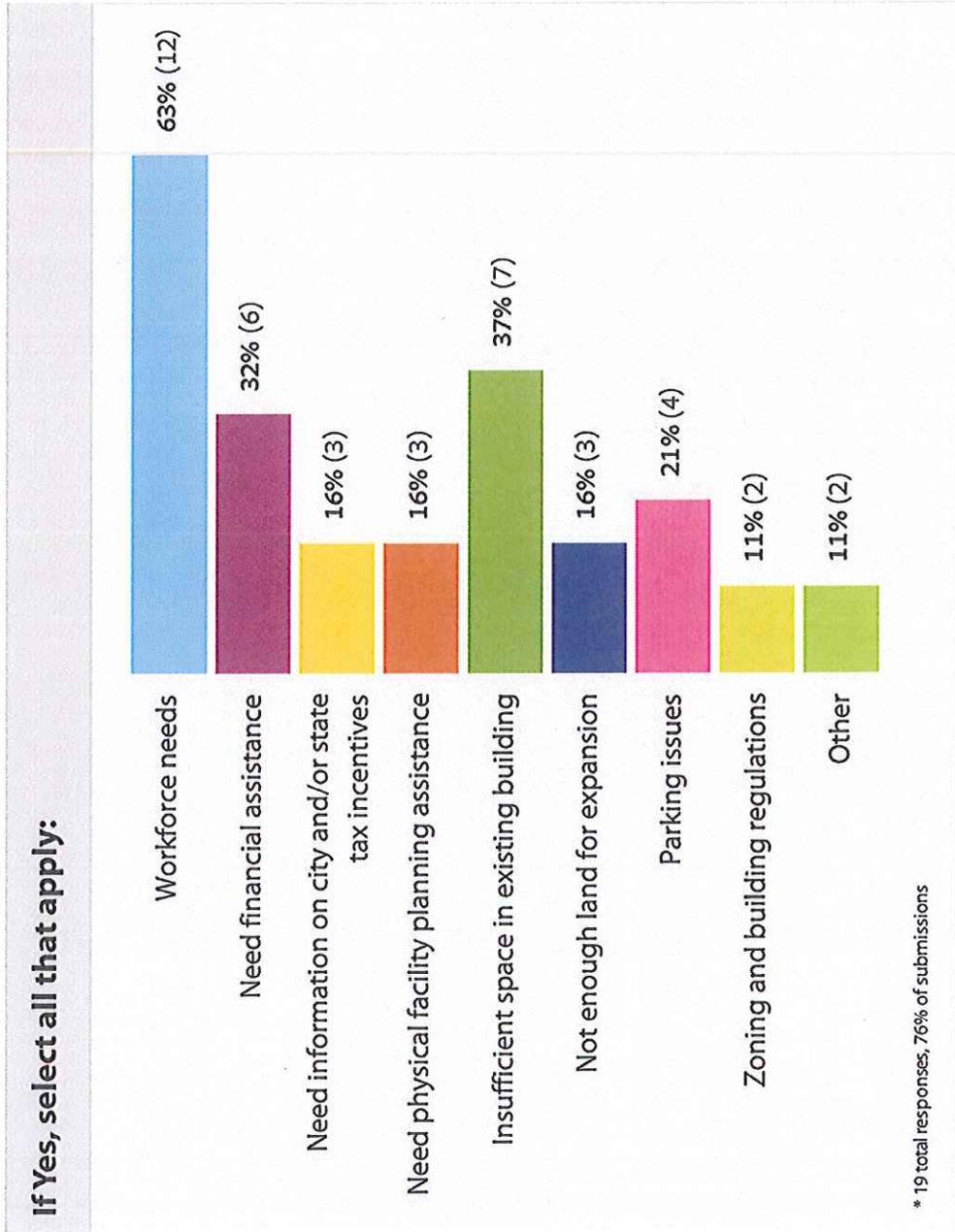
* 25 total responses, 100% of submissions

9. Do you face any constraints to expansion?



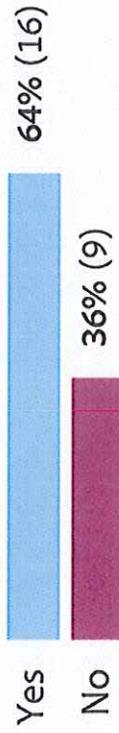
* 25 total responses, 100% of submissions

Key Findings: Plans



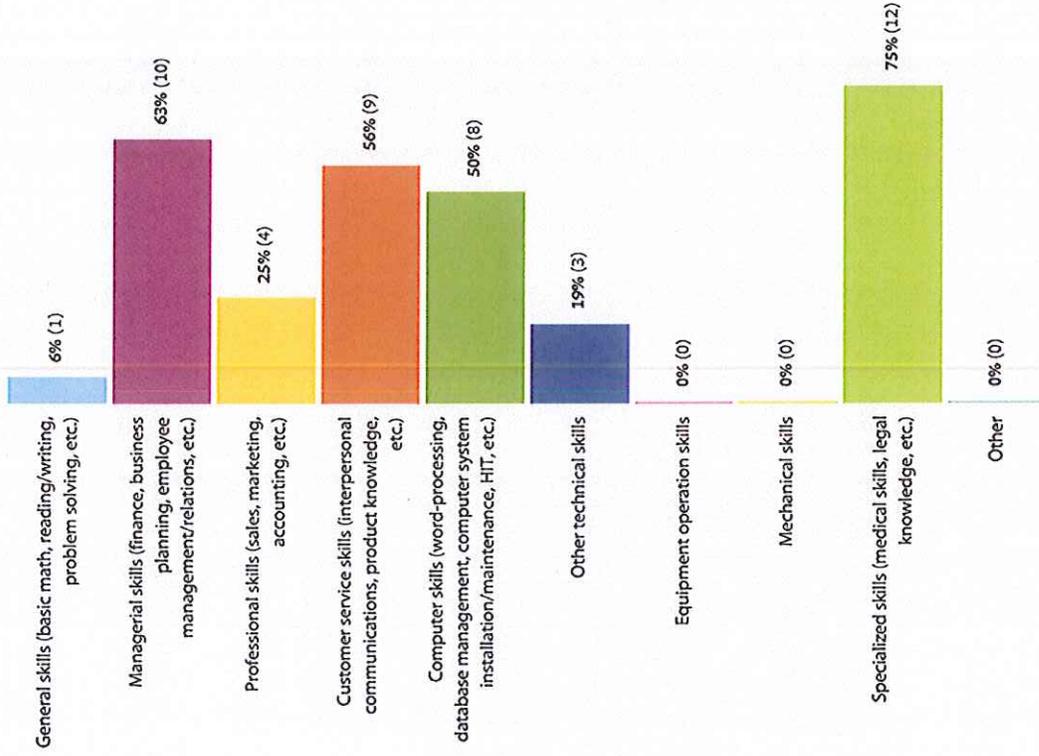
Key Findings: Workforce

10. Do your current Nevada employees need training?



* 25 total responses, 100% of submissions

If Yes, select all that apply:



* 16 total responses, 64% of submissions

Key Findings: Workforce

12. Has your business hired any positions in the last 12 months?



* 25 total responses, 100% of submissions

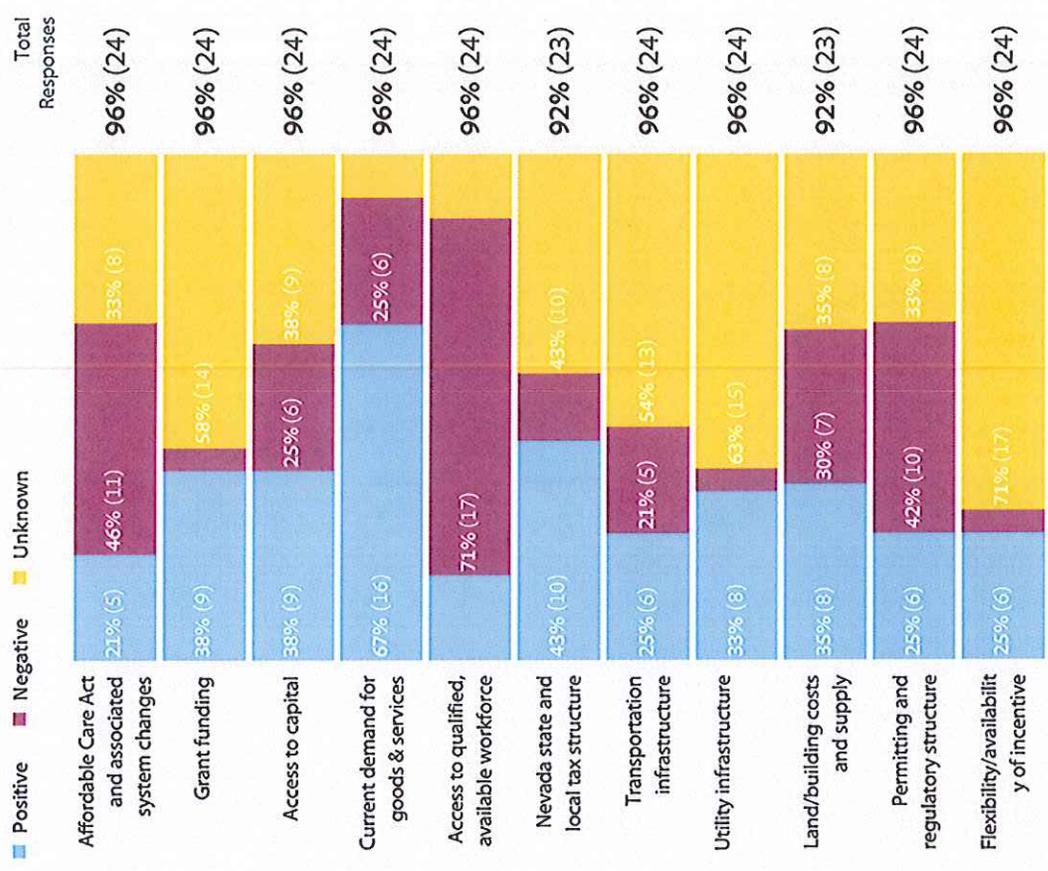
14. Do you anticipate that your business will hire any positions in the next 12-18 months?



* 25 total responses, 100% of submissions

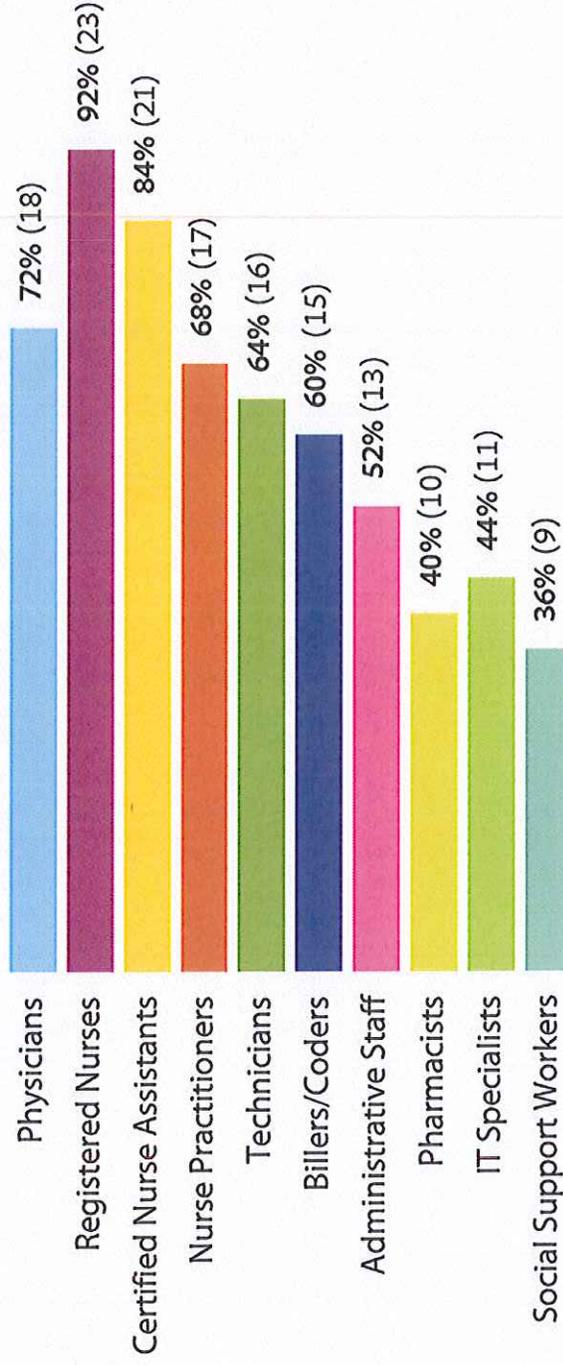
Key Findings: Workforce

16. Of the economic and policy drivers listed below, please indicate their impact on your company's current ability to hire?



Key Findings: Workforce

17. Which specific positions, if any, will your facility hire as a result of the economic and policy drivers identified above? (Select all that apply)



6 additional choices not shown

* 25 total responses, 100% of submissions

Summary

- Demographics: Large and established
- Business Climate: Favorable with room for improvement
- Plans: Expansion
- Workforce: Top concern
 - Inability to find enough qualified workers
 - Existing workers need training
 - Shortage of specialized medical and managerial skills

Governors Office of Economic Development

Bob Potts

Research Director

702-486-2700

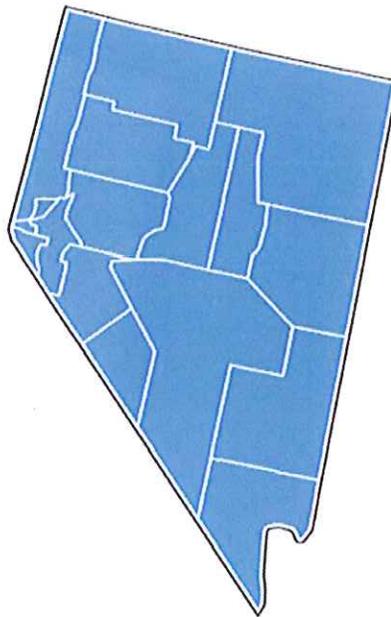
bpotts@diversifynevada.com

Nevada Governor's Office of

ECONOMIC DEVELOPMENT

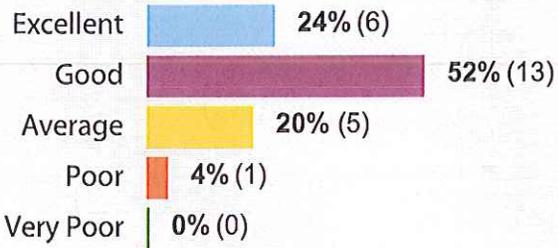
Empowering Success

Pilot Health Care Employer Survey



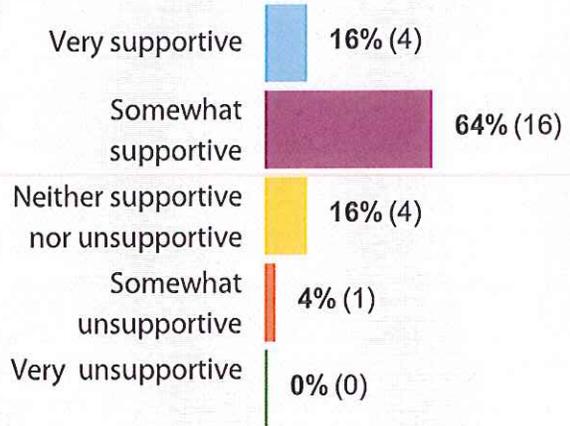
October 2013

1. What is your overall opinion of Nevada as a place to do business? (select only one)



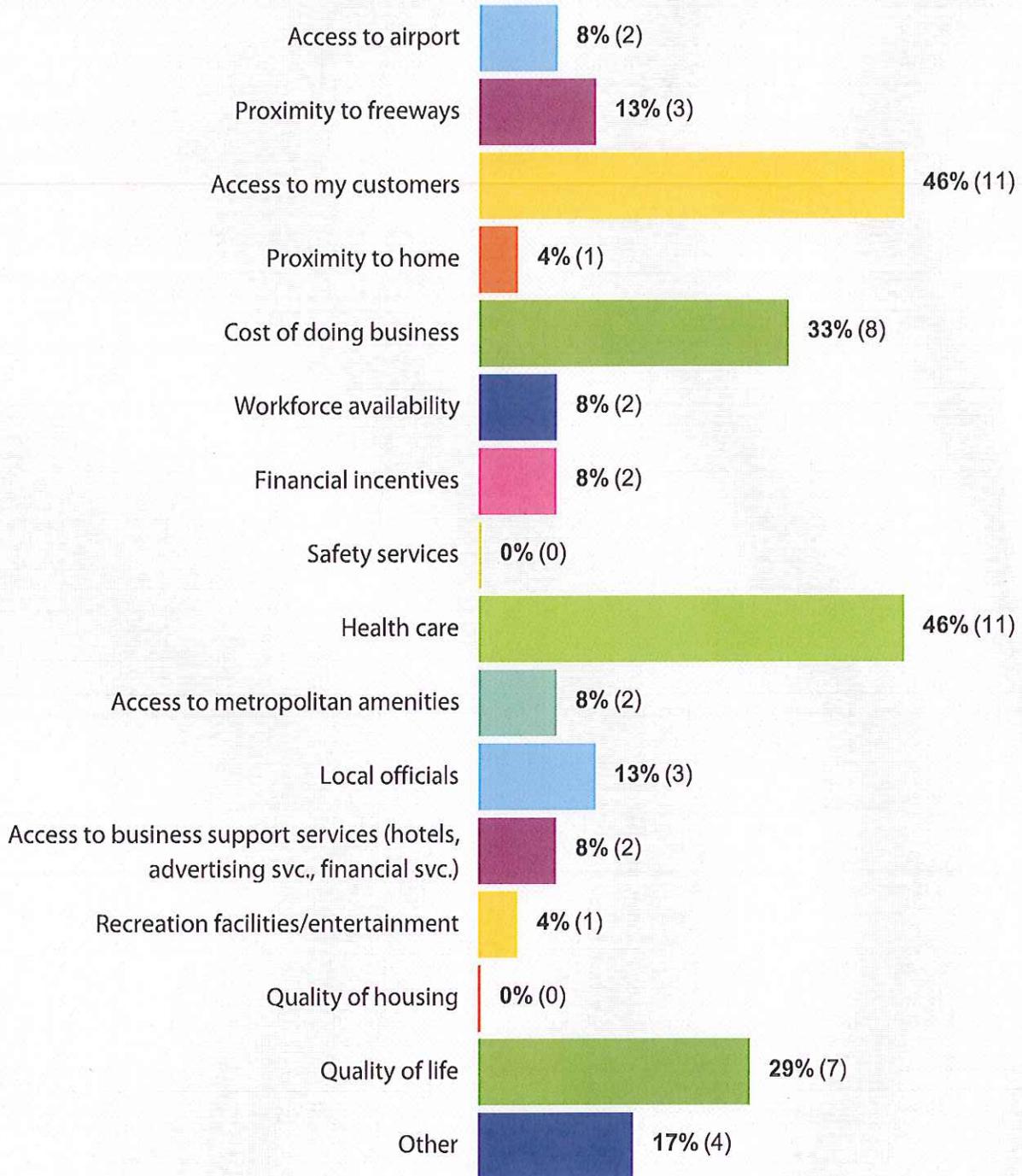
* 25 total responses, 100% of submissions

2. In general, how would you rate Nevada's support of business owners?



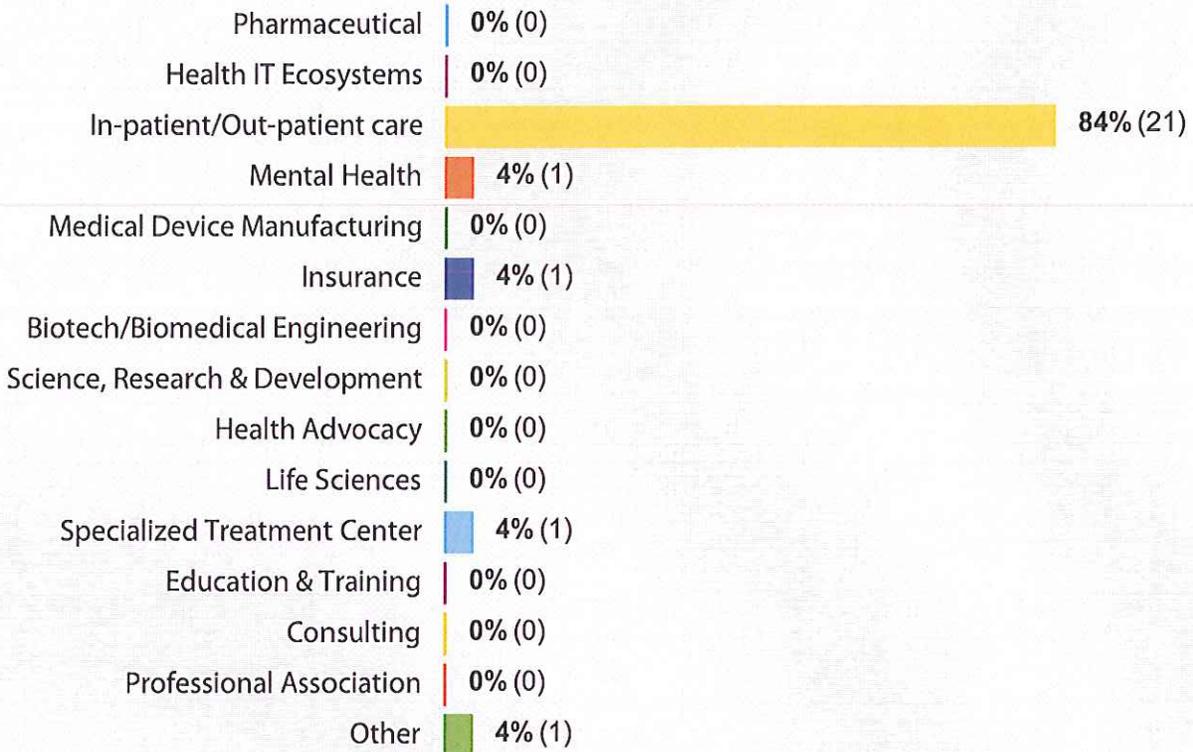
* 25 total responses, 100% of submissions

3. What are your top three (3) reasons for locating or keeping your business in Nevada? (Select top 3)



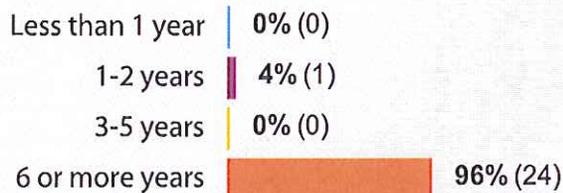
* 24 total responses, 96% of submissions

4. What Industry cluster does your business most closely identify with?



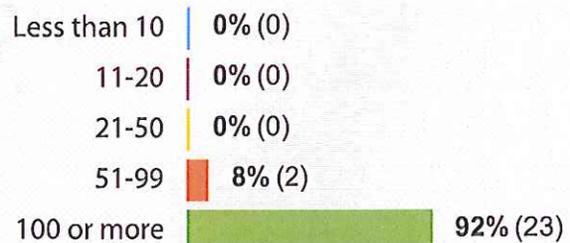
* 25 total responses, 100% of submissions

5. How long has your business been operating in Nevada?



* 25 total responses, 100% of submissions

6. How many employees currently work at your Nevada location?



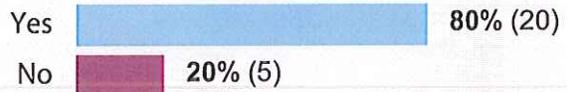
* 25 total responses, 100% of submissions

7. Is this your company's main/headquarter location?



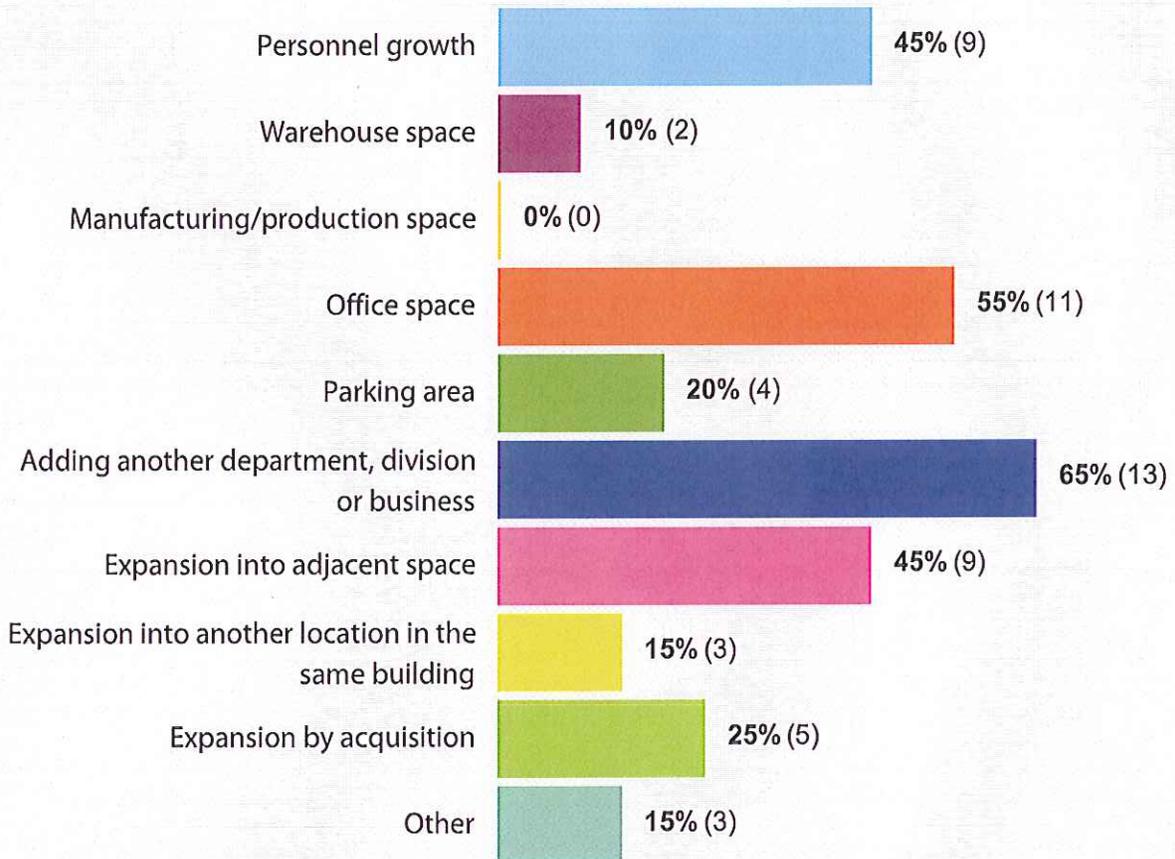
* 25 total responses, 100% of submissions

8. Are you planning to modernize, renovate, or expand your Nevada business in the next 12-18 months?



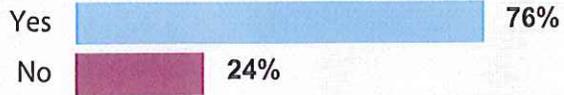
* 25 total responses, 100% of submissions

If Yes, select all that apply:



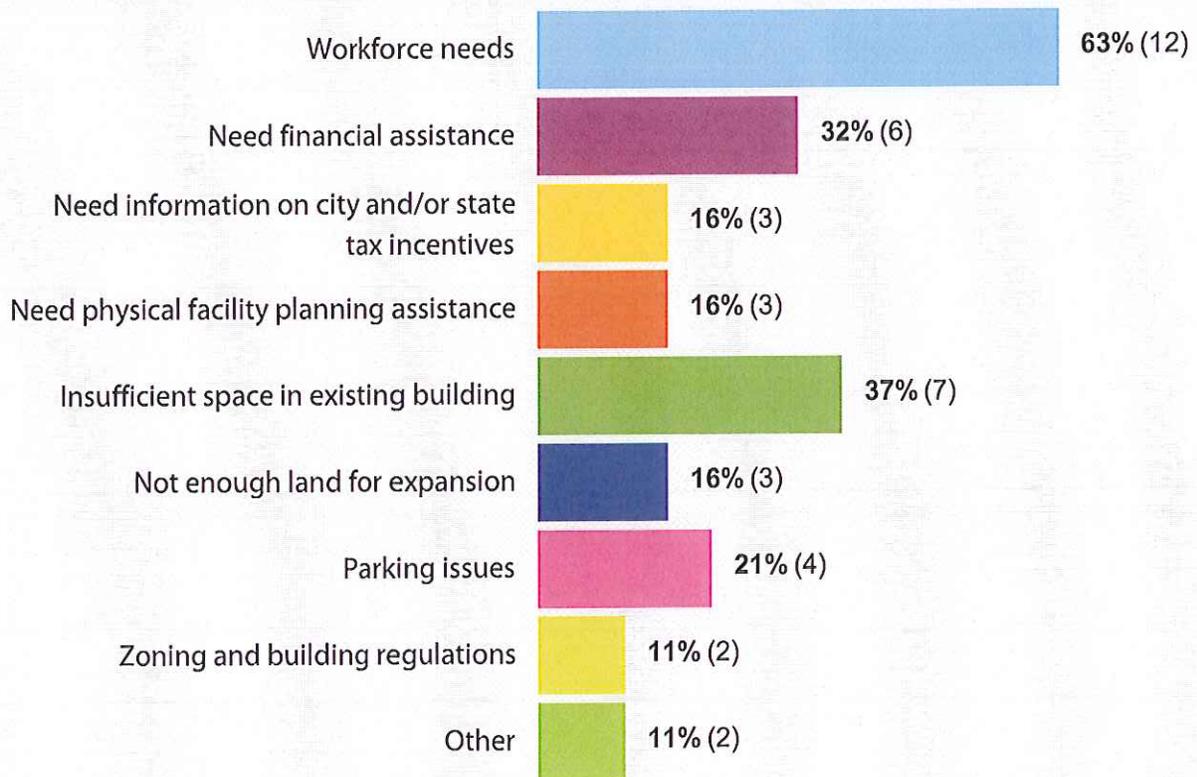
* 20 total responses, 80% of submissions

9. Do you face any constraints to expansion?



* 25 total responses, 100% of submissions

If Yes, select all that apply:



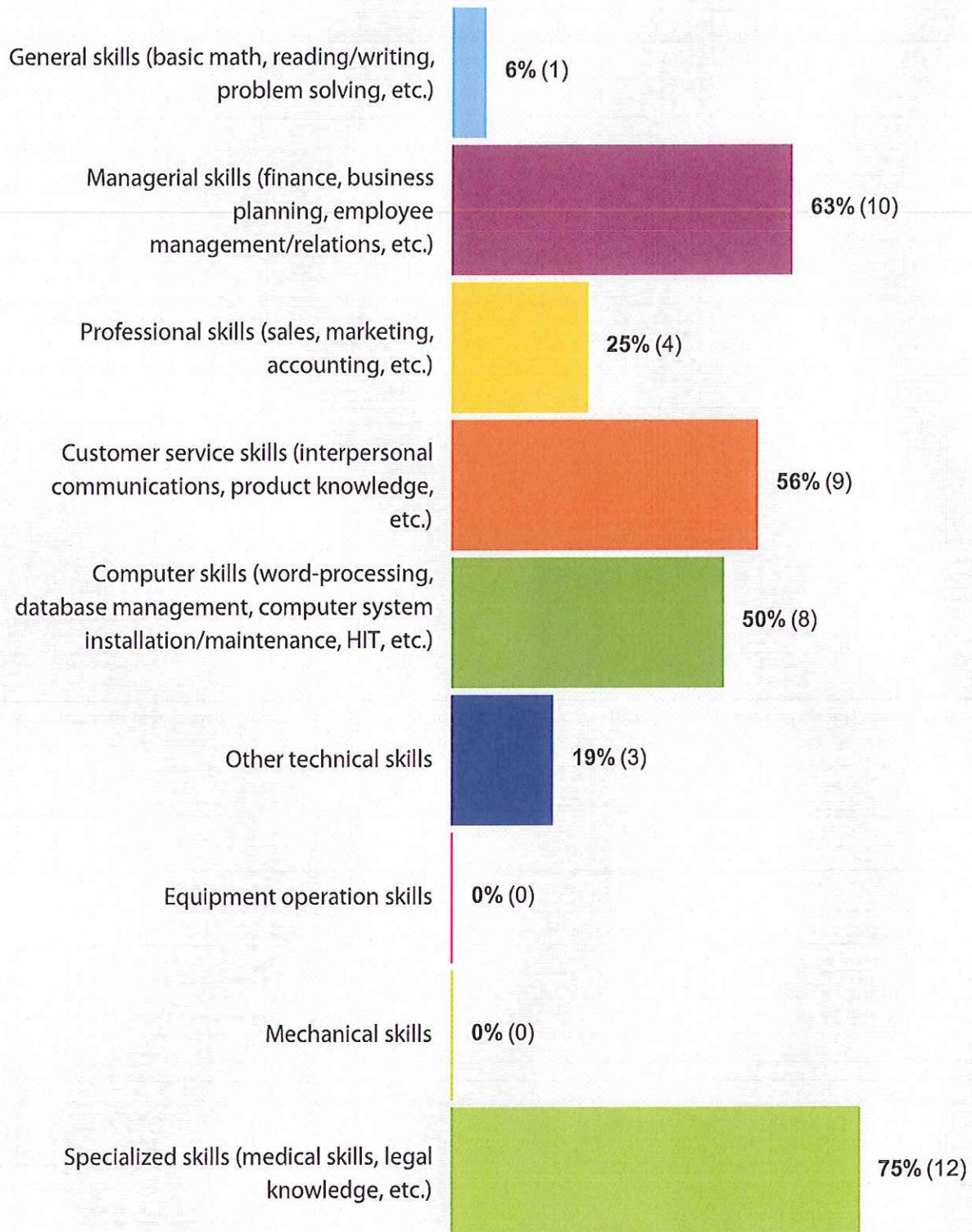
* 19 total responses, 76% of submissions

10. Do your current Nevada employees need training?



* 25 total responses, 100% of submissions

If Yes, select all that apply:



Other | 0% (0)

* 16 total responses, 64% of submissions

11. Are you aware of the Nevada state and local government training programs for business owners?



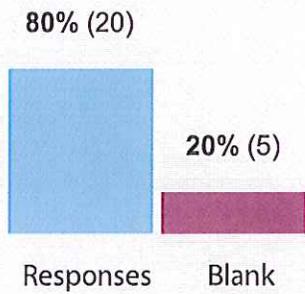
* 25 total responses, 100% of submissions

12. Has your business hired any positions in the last 12 months?



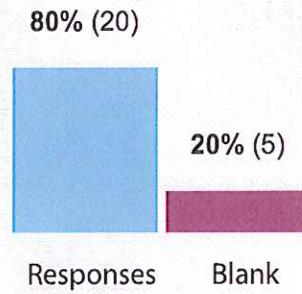
* 25 total responses, 100% of submissions

Number of Positions:



* 20 total responses, 80% of submissions

Position Titles:



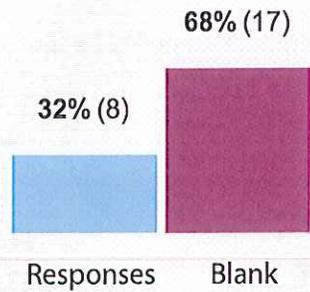
* 20 total responses, 80% of submissions

13. Has your business eliminated/restructured any positions in the last 12 months?



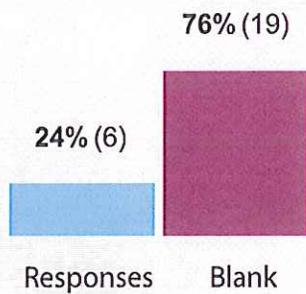
* 25 total responses, 100% of submissions

Number of Positions:



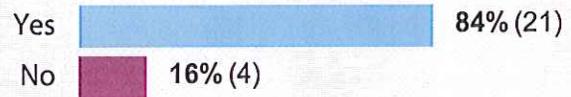
* 8 total responses, 32% of submissions

Position Titles:



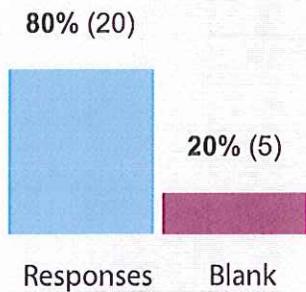
* 6 total responses, 24% of submissions

14. Do you anticipate that your business will hire any positions in the next 12-18 months?



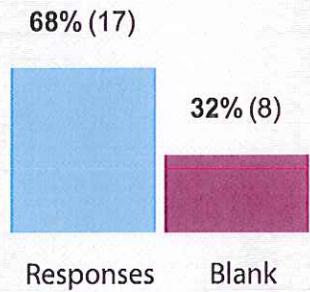
* 25 total responses, 100% of submissions

Number of Positions:



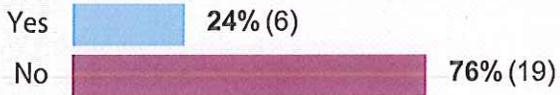
* 20 total responses, 80% of submissions

Position Titles:



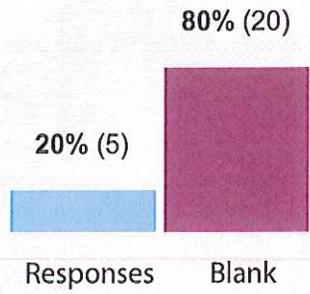
* 17 total responses, 68% of submissions

15. Do you anticipate that your business will eliminate/restructure positions in the next 12-18 months?



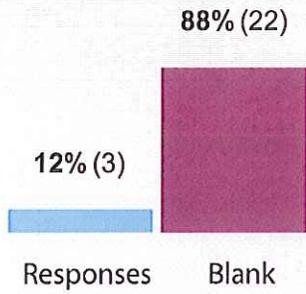
* 25 total responses, 100% of submissions

Number of Positions:



* 5 total responses, 20% of submissions

Position Titles:

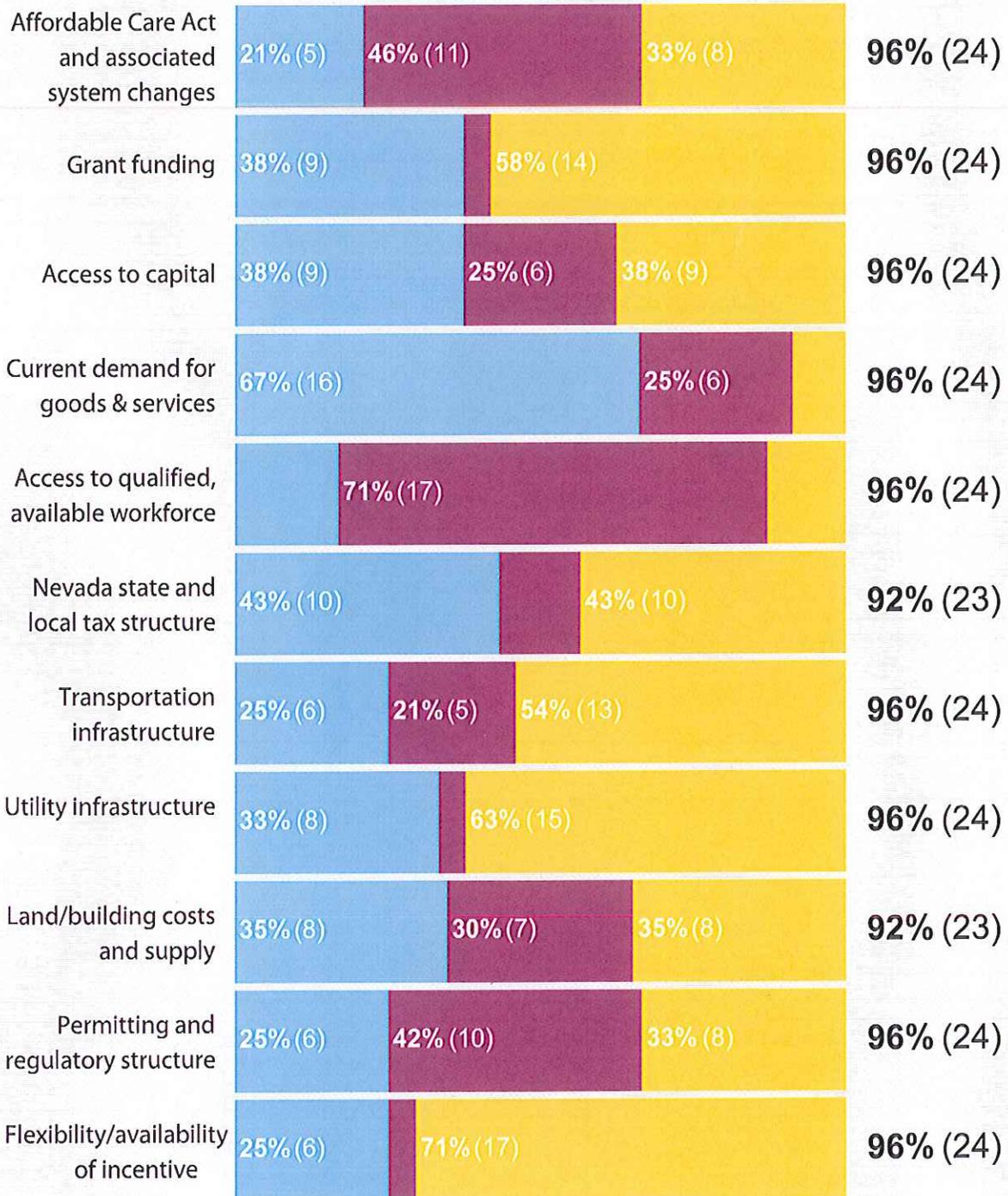


* 3 total responses, 12% of submissions

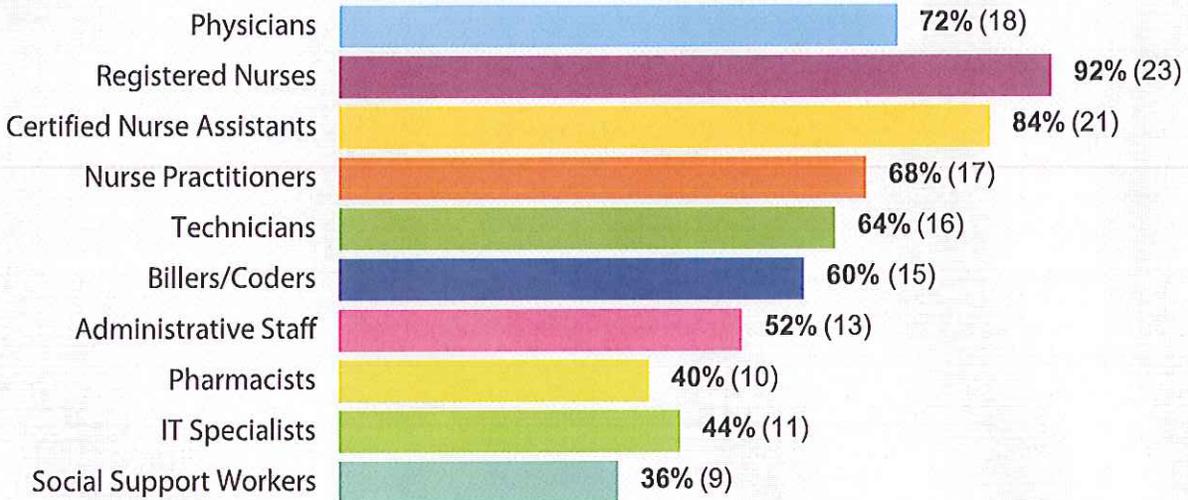
16. Of the economic and policy drivers listed below, please indicate their impact on your company's current ability to hire?

■ Positive ■ Negative ■ Unknown

Total Responses



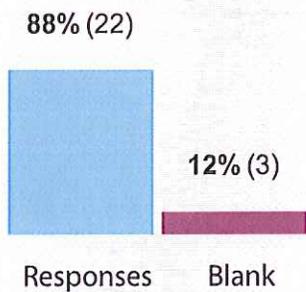
17. Which specific positions, if any, will your facility hire as a result of the economic and policy drivers identified above? (Select all that apply)



6 additional choices not shown

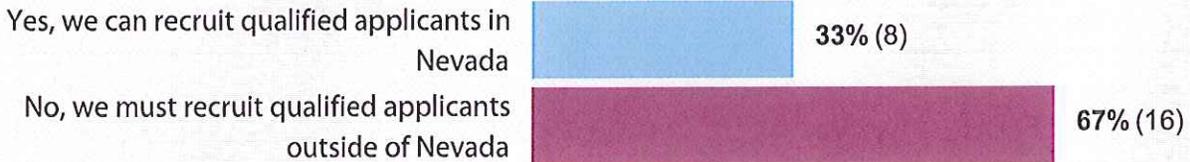
* 25 total responses, 100% of submissions

18. What positions are the most difficult for your facility to find qualified applicants? Please be specific.



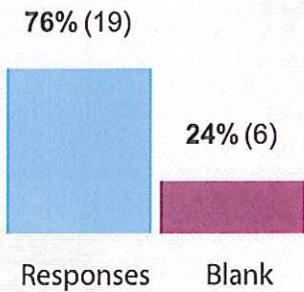
* 22 total responses, 88% of submissions

19. For your workforce needs, do you believe there are qualified applicants within Nevada or do you anticipate a need to recruit from outside the state?



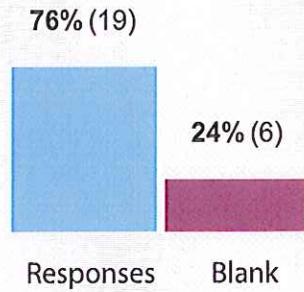
* 24 total responses, 96% of submissions

20. What is your perception of available health care services in Nevada? Please describe in few words.



* 19 total responses, 76% of submissions

21. What training or education could be provided within Nevada so more positions could be filled locally?



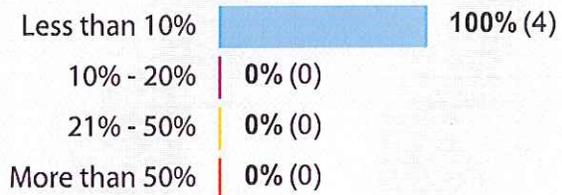
* 19 total responses, 76% of submissions

22. Have you ever sold merchandise or services to a customer outside of the U.S. and its territories?



* 25 total responses, 100% of submissions

23. What percentage of your business sales is from exporting?



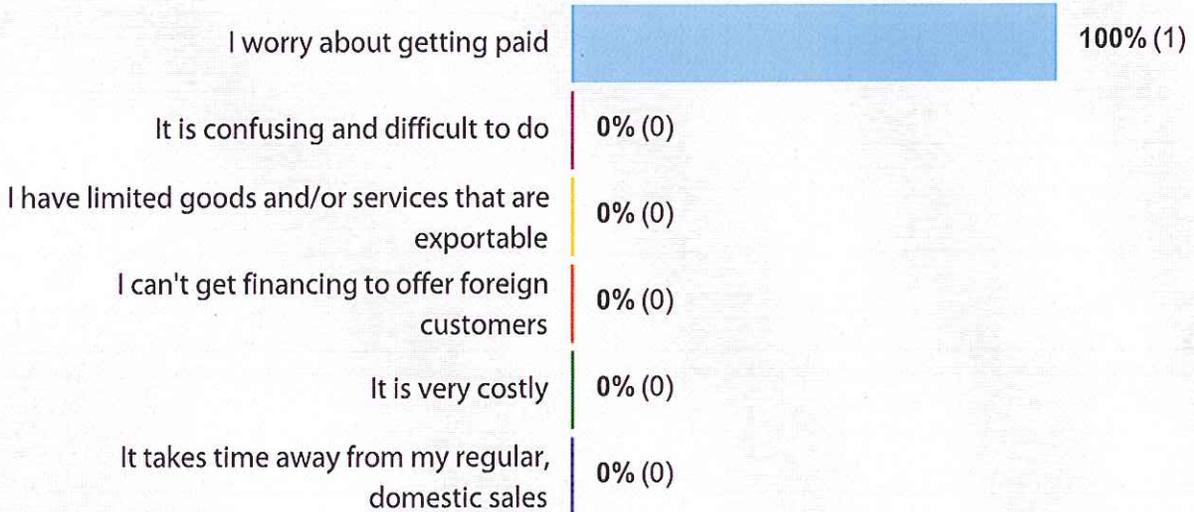
* 4 total responses, 16% of submissions

24. In the last 5 years, has your business experienced a significant increase or decrease in your export volume, or has your export volume stayed about the same?



* 3 total responses, 12% of submissions

25. What is the largest challenge to selling your goods and/or services to foreign customers? (Select all that apply)



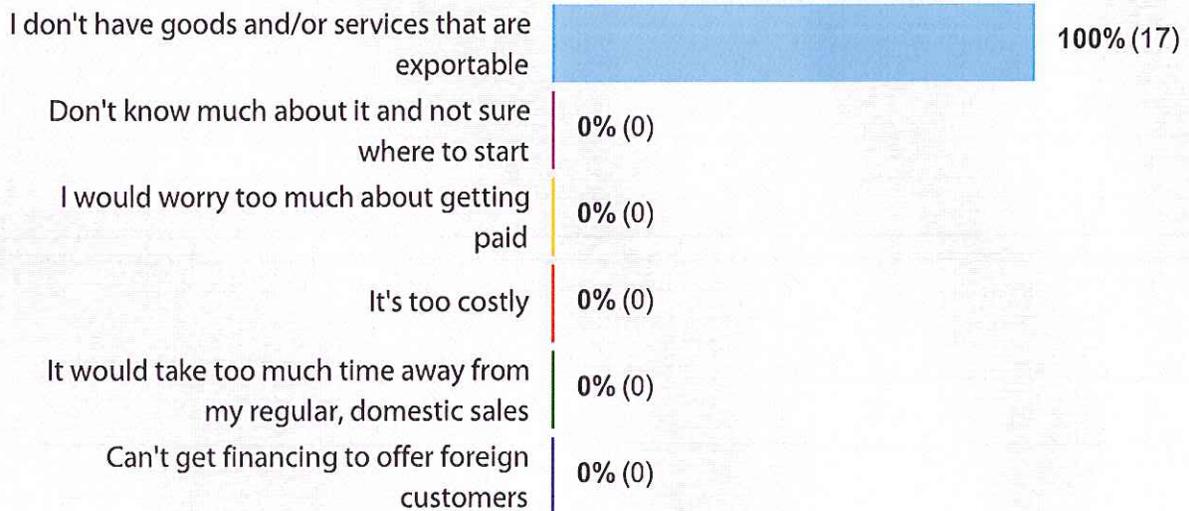
* 1 total response, 4% of submissions

26. Would you be interested in selling merchandise or services to a foreign customer in the future, if some of your concerns could be addressed?



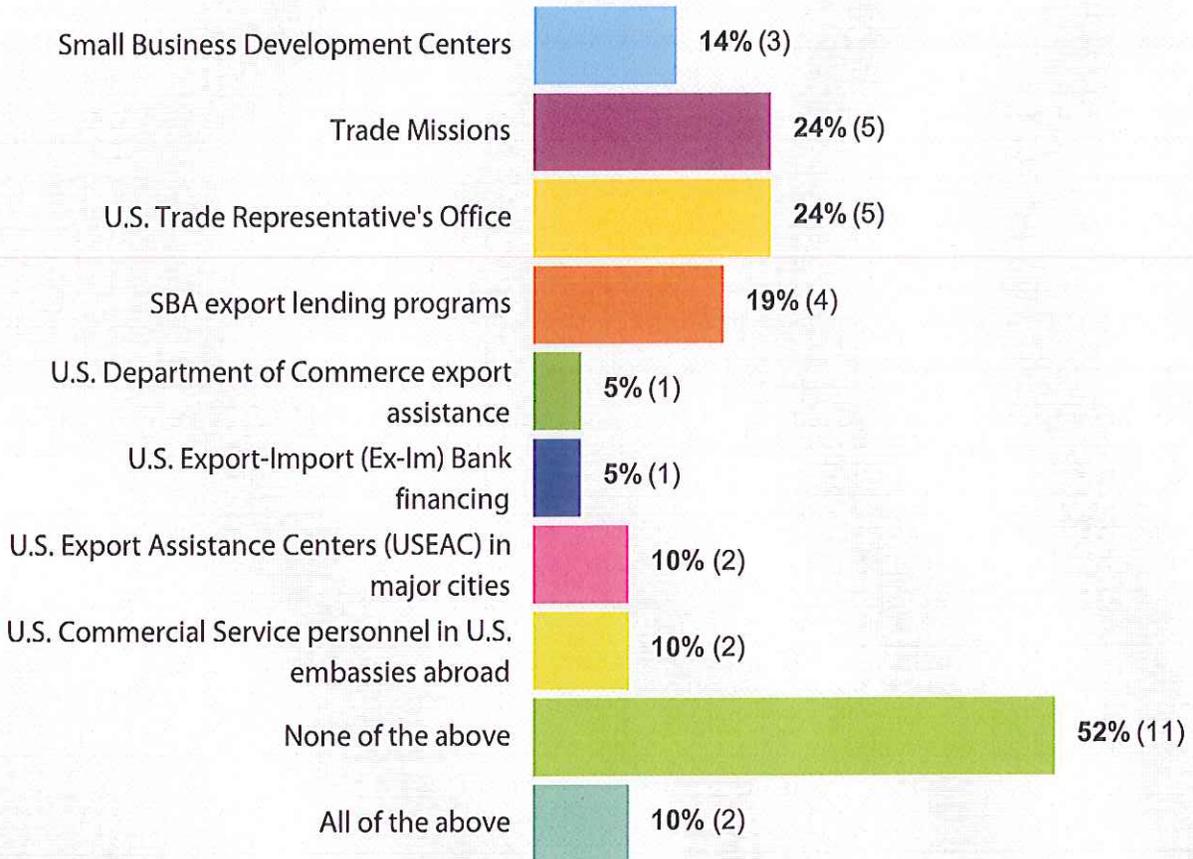
* 21 total responses, 84% of submissions

27. What do you consider the main barriers to selling your goods and/or services to foreign customers? (Select all that apply)



* 17 total responses, 68% of submissions

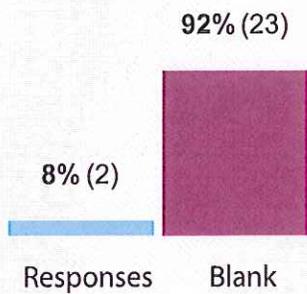
Column 1



3 additional choices not shown

* 21 total responses, 84% of submissions

Additional comments:



* 2 total responses, 8% of submissions

Open-ended Hospital Survey Responses

#12 RNs, CNAs, LPNs, Human Resources, Clerical/Admin support staff, Dietitians, Social Workers, PAs, Cooks, Physicians, Sales/Marketing, Occupational Therapists, Housekeeping staff, Lab techs, Coders, Pharmacists, IT Specialists, Phlebotomists, Surgical Techs, Telemetry techs, EMTs, Paramedics, HIM Coders, Discharge Planners

Total positions hired: 4,029

#13 Transcription, Director of Risk Management, Director of Homecare, Marketing Reps, Business Office Clerk, A/R Rep, RN Educator, Managers & Directors in an effort to consolidate responsibilities

Total positions eliminated/restructured: 143

#14 RNs, CNAs, Physicians, PAs, Advanced Practice Nurse Practitioners, Technicians, Therapists, Medical Directors, Social Workers, Office Manager, Admin support, Phlebotomists, Medical assistants, Pharm techs, Housekeeping staff, Surgical Techs, Admitting clerks, Dietitians, Registered Respiratory & Radiology Techs, Food Service Workers, Pharmacists, Paramedics, EMTs, O.R. Techs, PBX Operators, Med Techs, CRNAs, Nurse managers, Case managers, IT Techs, Billing & Coding specialists

Total positions expecting to be filled: 2,971

#15 Business office employees, accounts payable, billing & coding personnel

Total positions expected to be eliminated/restructured: 151

#18 Physicians (psychiatrists), Experienced Nurses, Pharmacists, Med Techs, CFO, Rural healthcare personnel of all types, Respiratory Therapists, Managers of Clinical areas (Emergency Dept./Case Management), LCSWs, Critical Care Nurses, Physical Therapists, Occupational Therapists, Paramedics, Physicians (other), Certified Wound Care Nurses, RN Case Managers

#20 More demand than supply; Rural Nevada has very few Medicare/Medicaid providers; Aging workforce is a problem; lack of palliative care; limited number of primary care physicians, gaps in home health, hospice and school healthcare; lack of mental health services; lack of transplant & burn services

#21 Psychiatry GME; Medical school community outreach; Behavioral health specialists; Technicians (imaging & lab); EPIC certified IT programs; Hospice Fellowship; Paramedicine; Training for Occupational & Physical Therapists; Increased Residency Programs throughout Nevada; Paid internships for all ancillary health care professionals (ie, dietitians, OC, PT, Pharm techs, social workers, clinical psychologists, medical billers and coders); Expansion of class size at UNSOM; speech therapy programs

1. What is your overall opinion of Nevada as a place to do business?

(select only one)

- Excellent
- Good
- Average
- Poor
- Very Poor

2. In general, how would you rate Nevada's support of business owners?

- Very supportive
- Somewhat supportive
- Neither supportive nor unsupportive
- Somewhat unsupportive
- Very unsupportive

3. What are your top three (3) reasons for locating or keeping your business in Nevada?

(Select top 3)

- Access to airport
- Proximity to freeways
- Access to my customers
- Proximity to home
- Cost of doing business
- Workforce availability
- Financial incentives
- Safety services
- Health care
- Access to metropolitan amenities
- Local officials
- Access to business support services (hotels, advertising svc., financial svc.)
- Recreation facilities/entertainment
- Quality of housing
- Quality of life
- Other

4. What Industry cluster does your business most closely identify with?

- Pharmaceutical
- Health IT Ecosystems
- In-patient/Out-patient care
- Mental Health
- Medical Device Manufacturing
- Insurance
- Biotech/Biomedical Engineering
- Science, Research & Development
- Health Advocacy
- Life Sciences
- Specialized Treatment Center
- Education & Training
- Consulting
- Professional Association
- Other

5. How long has your business been operating in Nevada?

- Less than 1 year
- 1-2 years
- 3-5 years
- 6 or more years

6. How many employees currently work at your Nevada location?

- Less than 10
- 11-20
- 21-50
- 51-99
- 100 or more

7. Is this your company's main/headquarter location?

- Yes
- No

8. Are you planning to modernize, renovate, or expand your Nevada business in the next 12-18 months?

- Yes
- No

If **Yes**, select all that apply:

- Personnel growth
- Warehouse space
- Manufacturing/production space
- Office space
- Parking area
- Adding another department, division or business
- Expansion into adjacent space
- Expansion into another location in the same building
- Expansion by acquisition
- Other

9. Do you face any constraints to expansion?

- Yes
- No

If **Yes**, select all that apply:

- Workforce needs
- Need financial assistance
- Need information on city and/or state tax incentives
- Need physical facility planning assistance
- Insufficient space in existing building
- Not enough land for expansion
- Parking issues
- Zoning and building regulations
- Other

10. Do your current Nevada employees need training?

- Yes
- No

If **Yes**, select all that apply:

- General skills (basic math, reading/writing, problem solving, etc.)
- Managerial skills (finance, business planning, employee management/relations, etc.)
- Professional skills (sales, marketing, accounting, etc.)
- Customer service skills (interpersonal communications, product knowledge, etc.)
- Computer skills (word-processing, database management, computer system installation/maintenance, HIT, etc.)
- Other technical skills
- Equipment operation skills
- Mechanical skills
- Specialized skills (medical skills, legal knowledge, etc.)
- Other

11. Are you aware of the Nevada state and local government training programs for business owners?

- Yes
- No

12. Has your business hired any positions in the last 12 months?

- Yes
- No

If **Yes**, enter following data:

Number of Positions:

Position Titles:

13. Has your business eliminated/restructured any positions in the last 12 months?

Yes

No

If **Yes**, please enter the following:

Number of Positions:

Position Titles:

14. Do you anticipate that your business will hire any positions in the next 12-18 months?

Yes

No

If **Yes**, please enter the following:

Number of Positions:

Position Titles:

15. Do you anticipate that your business will eliminate/restructure positions in the next 12-18 months?

Yes

No

If **Yes**, please enter the following:

Number of Positions:

Position Titles:

16. Of the economic and policy drivers listed below, please indicate their impact on your company's current ability to hire?

	Positive	Negative	Unknown
Affordable Care Act and associated system changes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grant funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to capital	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current demand for goods & services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to qualified, available workforce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nevada state and local tax structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utility infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Land/building costs and supply	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Permitting and regulatory structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flexibility/availability of incentive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

17. Which specific positions, if any, will your facility hire as a result of the economic and policy drivers identified above? (Select all that apply)

- Physicians
- Registered Nurses
- Certified Nurse Assistants
- Nurse Practitioners
- Technicians
- Billers/Coders
- Physician Assistants
- Administrative Staff
- Pharmacists
- IT Specialists
- Community Health Workers
- Health Educators
- Nutritionists
- Home Health Aides
- Social Support Workers
- Other

18. What positions are the most difficult for your facility to find qualified applicants?
Please be specific.

19. For your workforce needs, do you believe there are qualified applicants within Nevada or do you anticipate a need to recruit from outside the state?

- Yes, we can recruit qualified applicants in Nevada
- No, we must recruit qualified applicants outside of Nevada

20. What is your perception of available health care services in Nevada?
Please describe in few words.

21. What training or education could be provided within Nevada so more positions could be filled locally?

22. Have you ever sold merchandise or services to a customer outside of the U.S. and its territories?

- Yes
- No

If **No**, Proceed to Question #26.

23. What percentage of your business sales is from exporting?

- Less than 10%
- 10% - 20%
- 21% - 50%
- More than 50%

24. In the last 5 years, has your business experienced a significant increase or decrease in your export volume, or has your export volume stayed about the same?

- Increase
- Decrease
- Stayed about the same

25. What is the largest challenge to selling your goods and/or services to foreign customers? (Select all that apply)

- I worry about getting paid
- It is confusing and difficult to do
- I have limited goods and/or services that are exportable
- I can't get financing to offer foreign customers
- It is very costly
- It takes time away from my regular, domestic sales

[SKIP to Question #28](#)

26. Would you be interested in selling merchandise or services to a foreign customer in the future, if some of your concerns could be addressed?

- Yes
- No

27. What do you consider the main barriers to selling your goods and/or services to foreign customers? (Select all that apply)

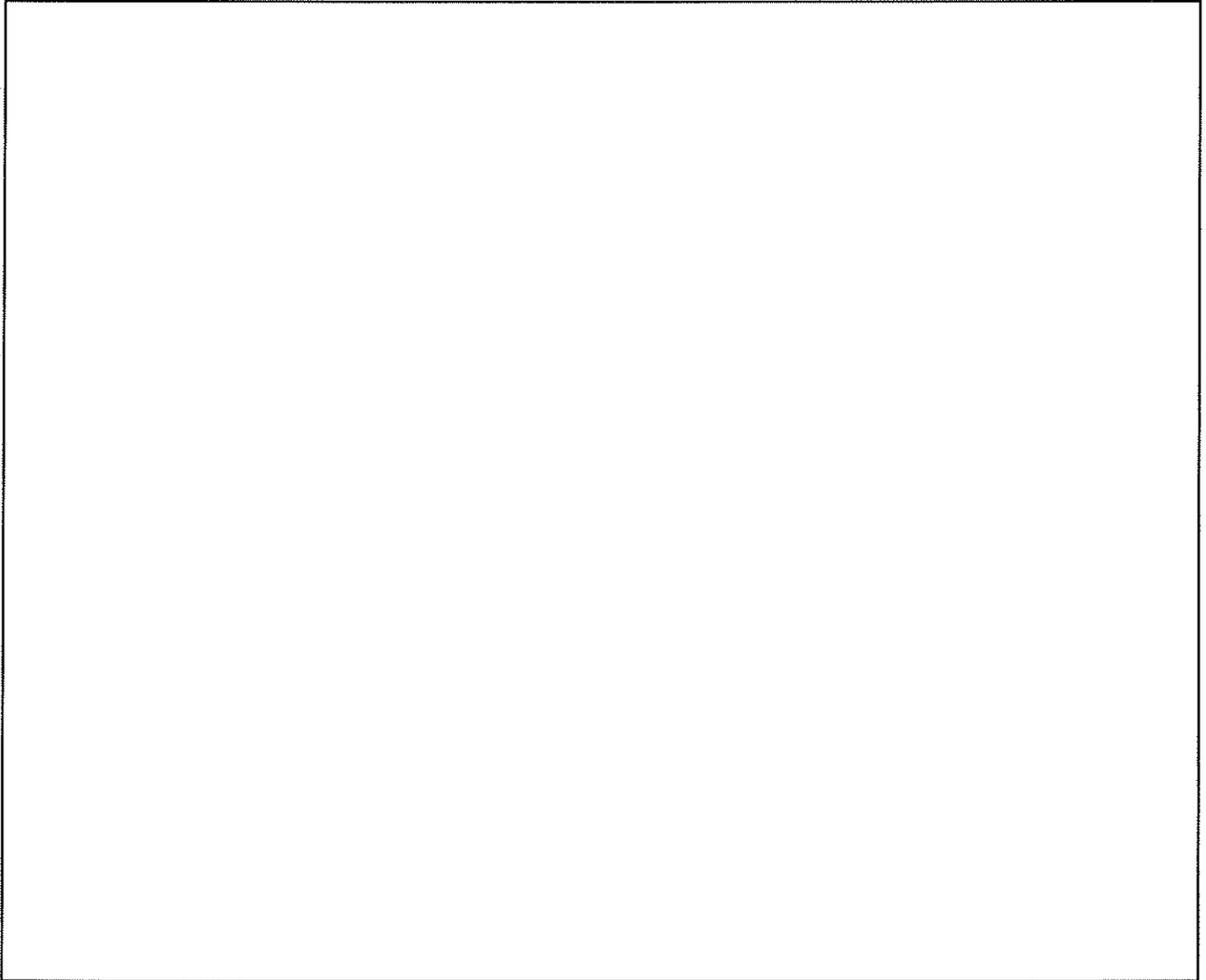
- I don't have goods and/or services that are exportable
- Don't know much about it and not sure where to start
- I would worry too much about getting paid
- It's too costly
- It would take too much time away from my regular, domestic sales
- Can't get financing to offer foreign customers

28. Which of the following government exporting programs have you heard of?

(Select all that apply)

- Small Business Development Centers
- Trade Missions
- U.S. Trade Representative's Office
- SBA export lending programs
- U.S. Department of Commerce export assistance
- U.S. Export-Import (Ex-Im) Bank financing
- U.S. Export Assistance Centers (USEAC) in major cities
- U.S. Department of Commerce Gold Key Program
- U.S. Commercial Service personnel in U.S. embassies abroad
- Overseas Private Investment Corporation loans and insurance
- District Export Council (DEC)
- None of the above
- All of the above

Additional comments:

A large, empty rectangular box with a thin black border, intended for providing additional comments. The box is currently blank.

Thank you.