

LAS VEGAS MEDICAL DISTRICT

Consultant Report

August 2, 2023

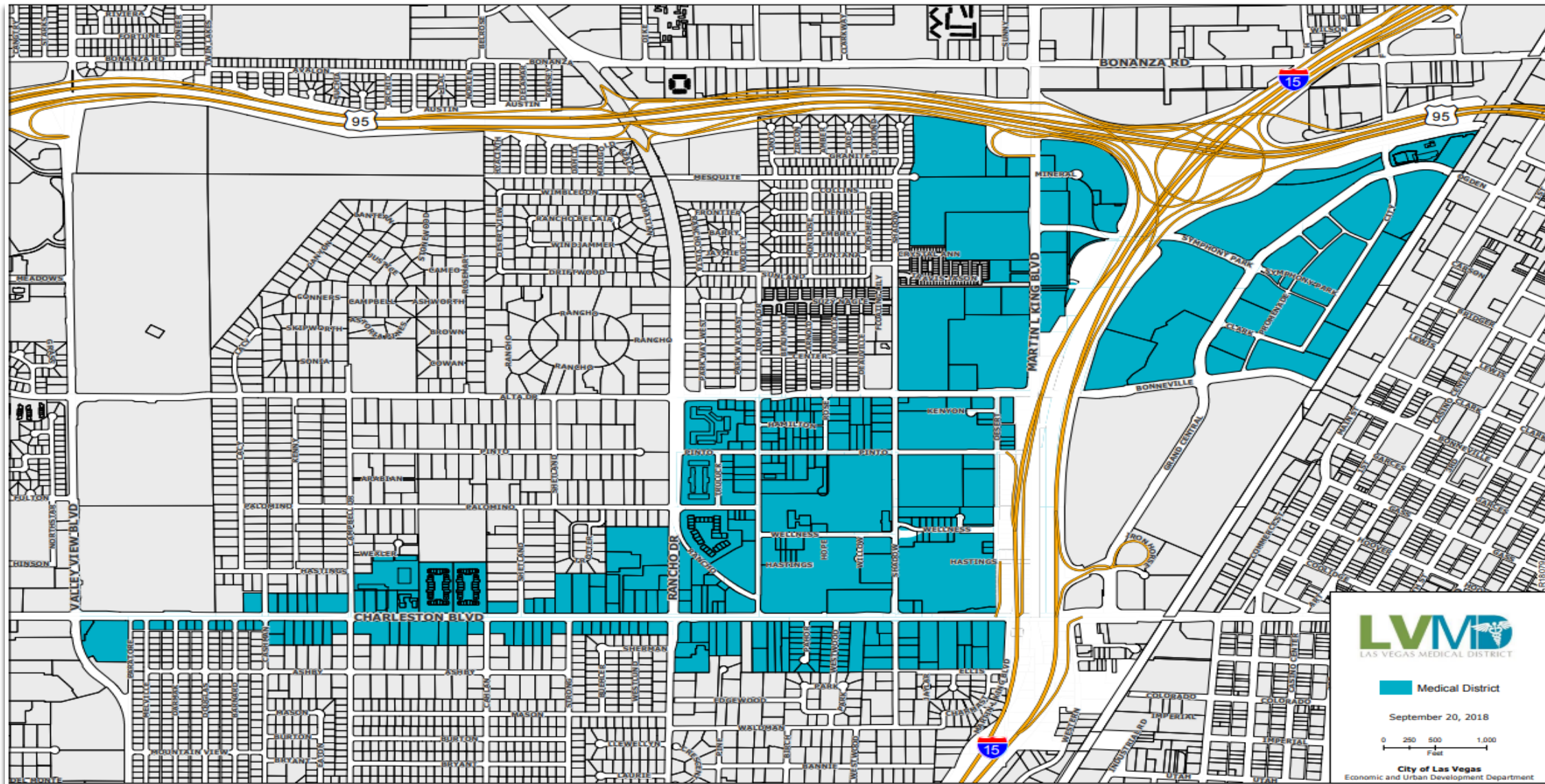
Ryan Smith, Director of Economic & Urban Development
Tammy Christensen, Economic Development Manager
Tabitha Pederson, Sr. Economic Development Specialist

Submitted at Meeting
Date: 8/2/2023 Item: 31
By Staff





LAS VEGAS MEDICAL DISTRICT





HEALTHCARE RANKINGS

Adults with AMI Reporting Unmet Need

Rank	State	%	#
27	North Dakota	28.20	30,000
28	Ohio	28.30	628,000
29	Arkansas	28.70	146,000
30	Louisiana	29.10	211,000
31	Georgia	29.10	363,000
32	Florida	29.10	838,000
33	Missouri	29.60	274,000
34	Texas	29.60	1,101,000
35	Alaska	29.80	33,000
36	Delaware	30.90	49,000
37	Massachusetts	31.10	364,000
38	Tennessee	31.40	323,000
39	Virginia	31.50	417,000
40	District of Columbia	32.20	44,000
41	Idaho	32.20	107,000
42	Maryland	32.50	249,000
43	Oregon	32.60	297,000
44	New Mexico	32.90	112,000
45	Utah	34.10	244,000
46	Colorado	34.20	353,000
47	Alabama	35.40	271,000
48	Kansas	35.80	219,000
49	Arizona	36.00	484,000
50	Nevada	37.60	189,000
51	Indiana	38.80	406,000





HEALTHCARE RANKINGS

America's Health Rankings						
Overall Clinical Care	20	23	27	39	46	50
	Colorado	Utah	California	Arizona	Nevada	Texas
Annual Access To Care	23	24	35	41	46	50
	Colorado	California	Utah	Arizona	Nevada	Texas
Avoided Care Due to Cost	28	30	34	34	45	49
	California	Colorado	Utah	Arizona	Nevada	Texas
Preventable Hospitalizations	3	4	10	12	25	32
	Utah	Colorado	Arizona	California	Nevada	Texas
Primary Care Providers	25	41	47	48	49	50
	Colorado	Arizona	Texas	California	Utah	Nevada
Uninsured	22	29	32	42	44	50
	California	Colorado	Utah	Arizona	Nevada	Texas
<small>Source: United Health Foundation's America's Health Rankings, 2022. Note: States are ranked 1 to 50, where 1 is best and 50 is worst. For more information, see americashealthrankings.org.</small>						

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HEALTHCARE RANKINGS

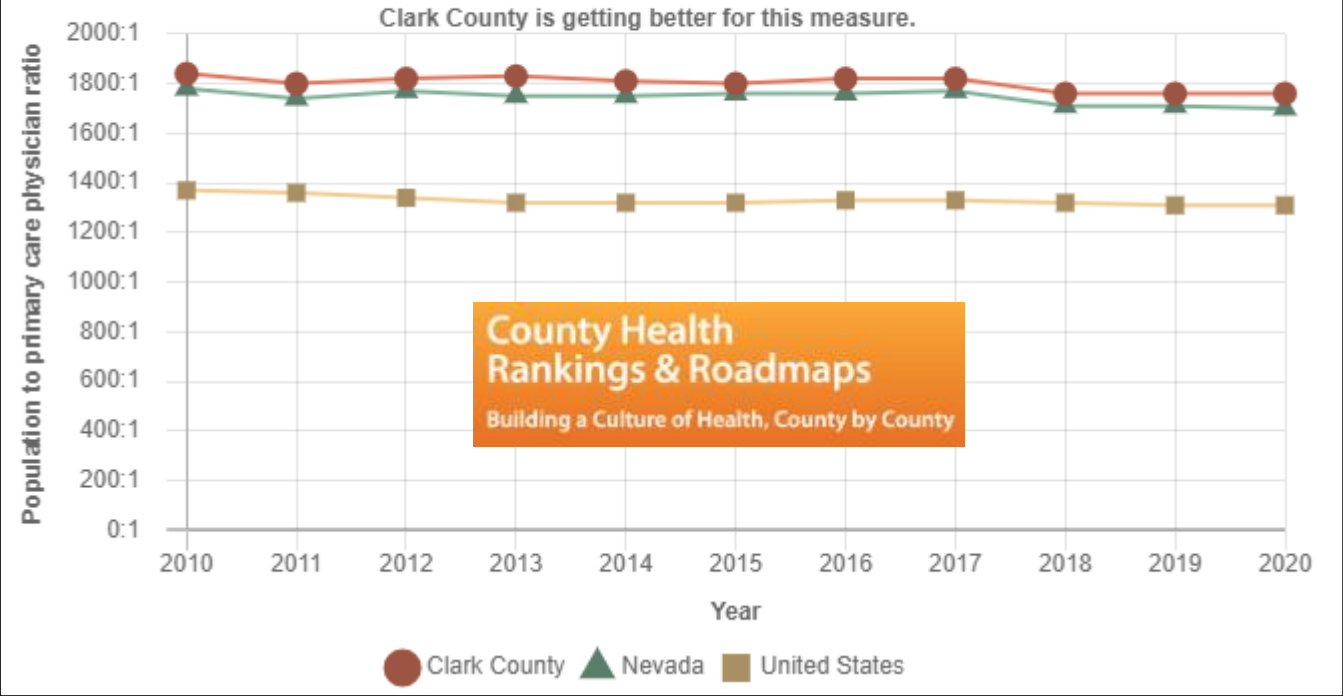
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Primary Care Physicians in Clark County, NV County, state and national trends





HEALTHCARE RANKINGS



Adults with AMI Reporting Unmet Need

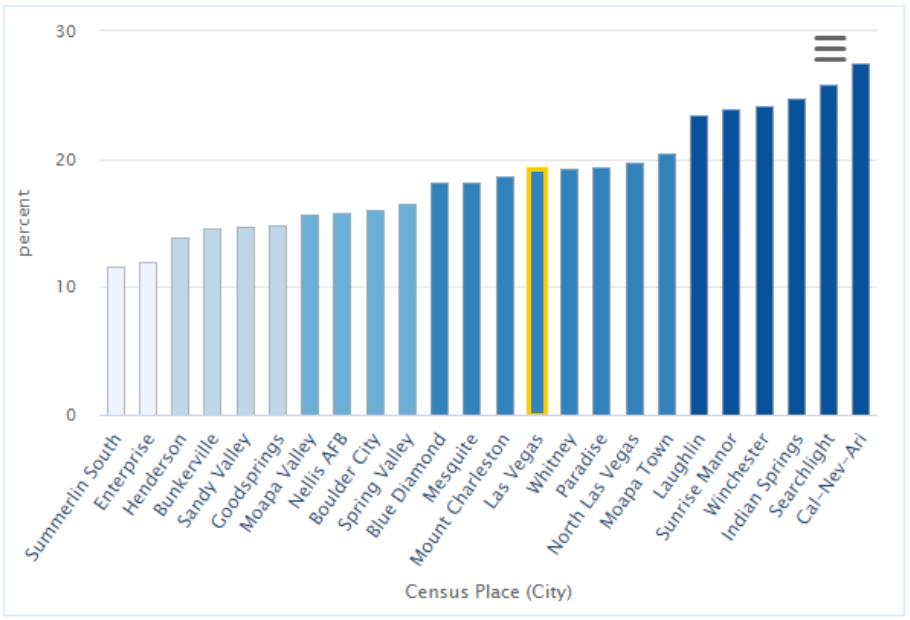
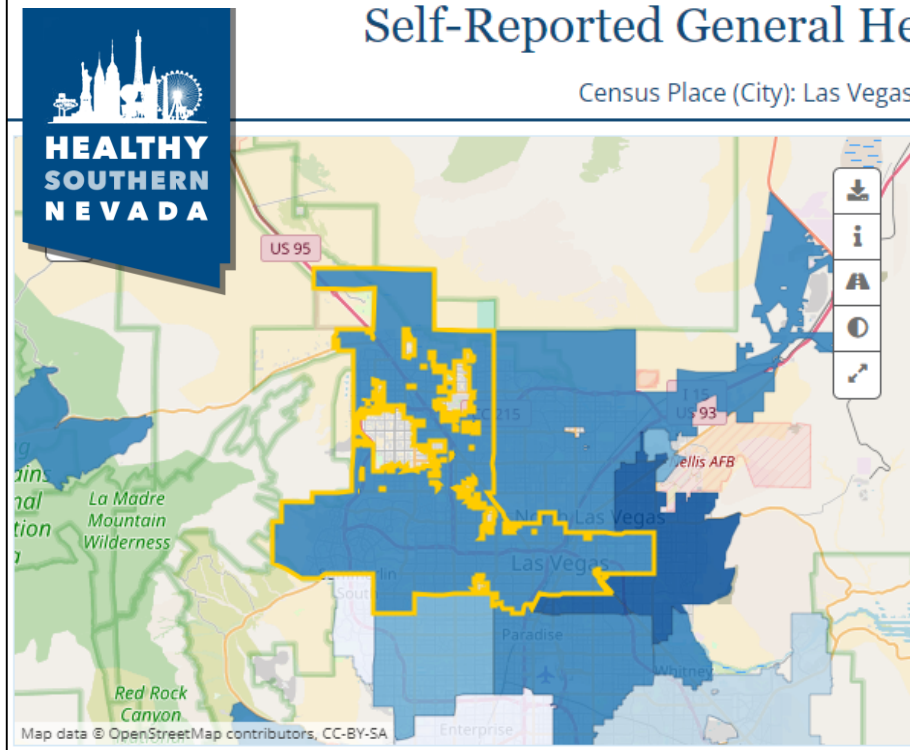
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Primary Care Physicians in Clark County, NV County, state and national trends



Self-Reported General Health Assessment: Poor or Fair ▼

Census Place (City): Las Vegas ▼ Measurement Period: 2020 ▼





LAS VEGAS MEDICAL DISTRICT
Consultant Selected



A Siemens Healthineers Company



LAS VEGAS MEDICAL DISTRICT

Stakeholder Engagement & Timeline



Stakeholder Interviews



LVMD Sponsor Group



Steering Committee

Work Phase Description	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March
Phase One: Current-State and Service Gap Assessment							
Phase Two: Capacity and Research Considerations							
Steering Committee (SC) Meetings ¹		SC Kickoff ●	●		● ●		
Interviews/Tours and LVMD Clinical Partner Engagement							
LVMD Sponsor Group Meetings	◆ ◆	◆ ◆	◆ ◆	◆ ◆	◆ ◆	◆ ◆	◆ ◆



Cleveland Clinic



OPTUM Care





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Project Goals & Objectives

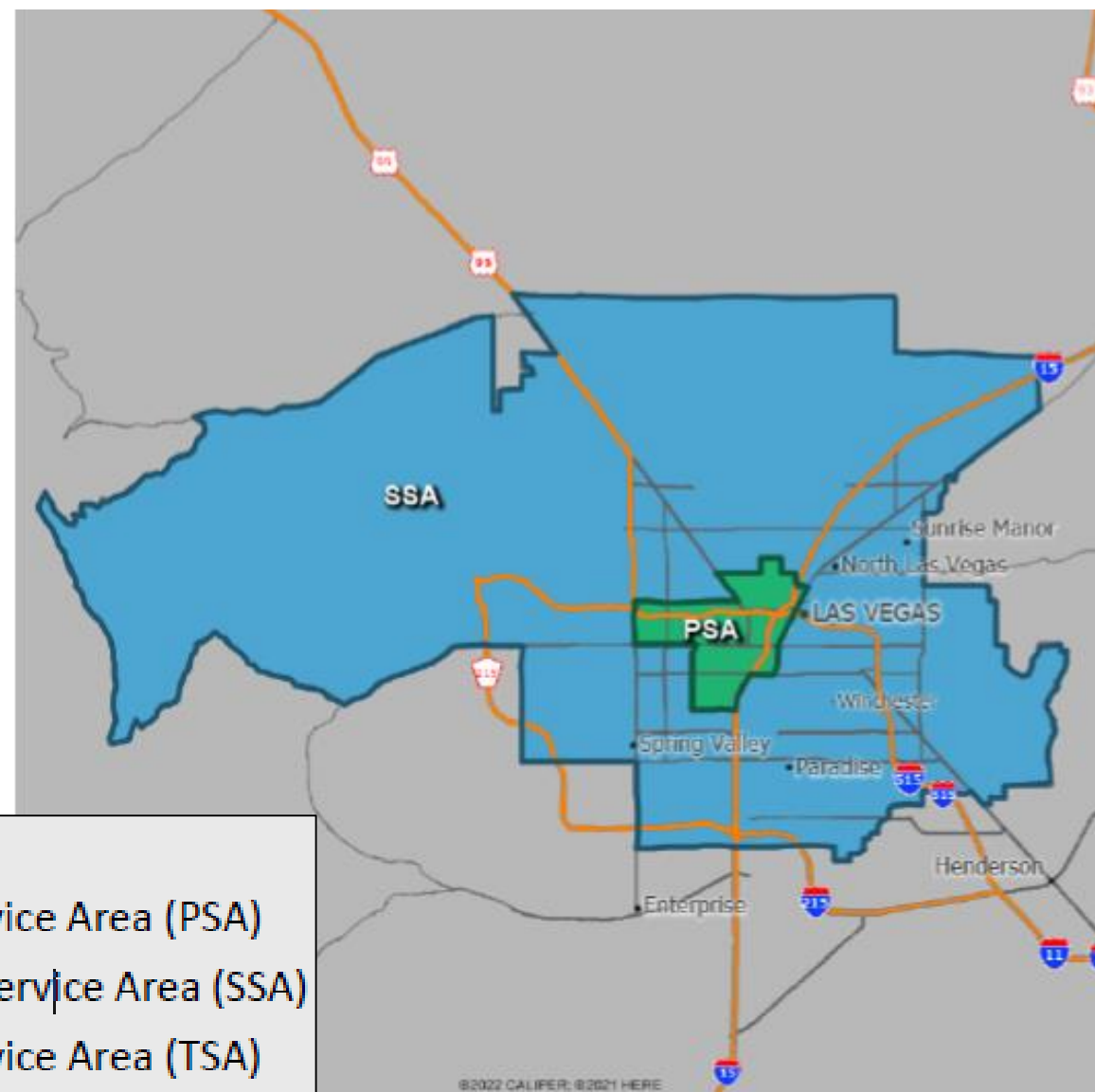
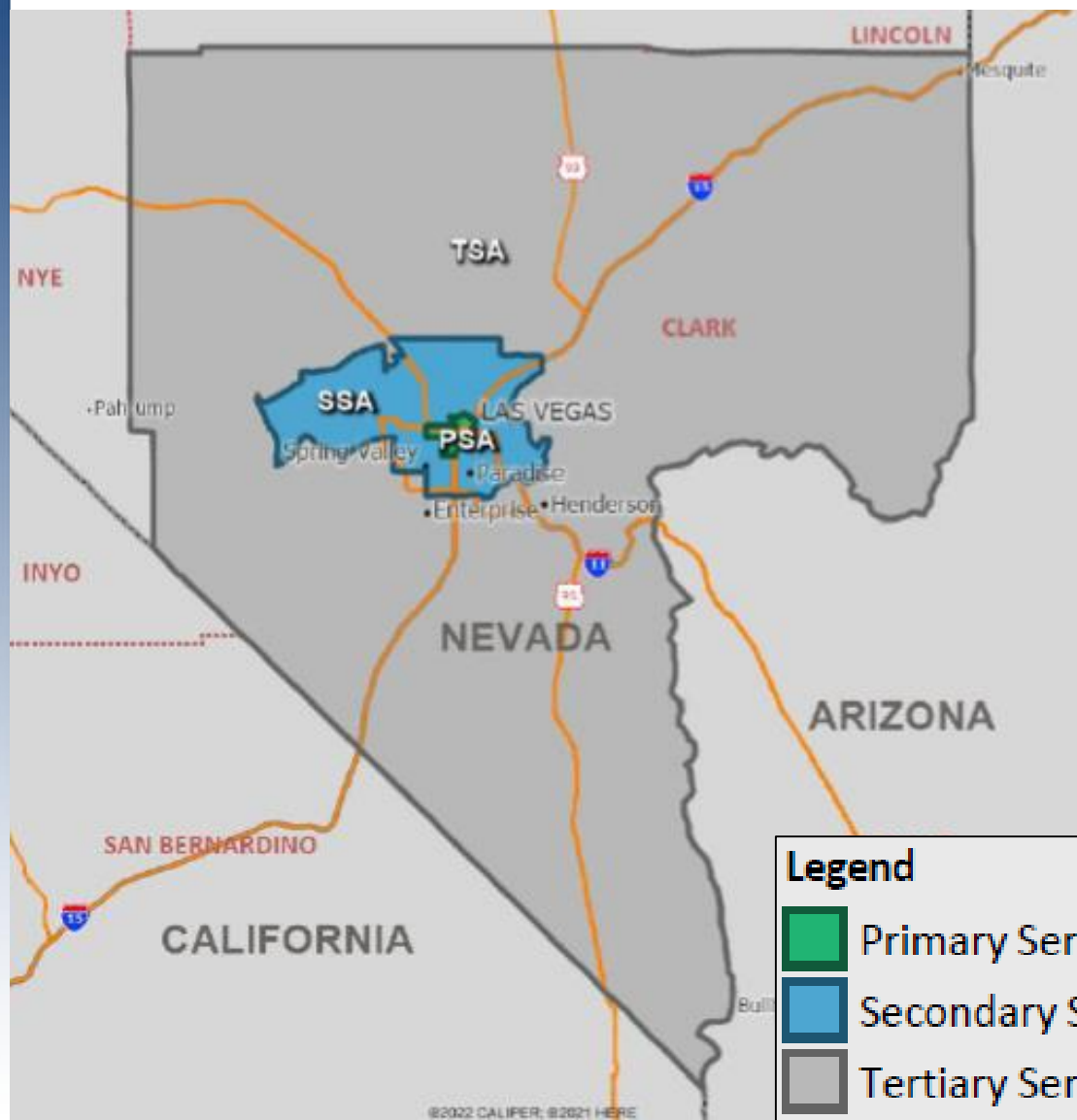
1. Recommend the highest-impact services through a gap assessment of current services compared to community need.
2. Outline key opportunities and risks associated with further investment in the biomedical research space, with recommended next steps.
3. Determine the highest and best use of current land and space within the LVMD.








LAS VEGAS MEDICAL DISTRICT

Service Area Definition



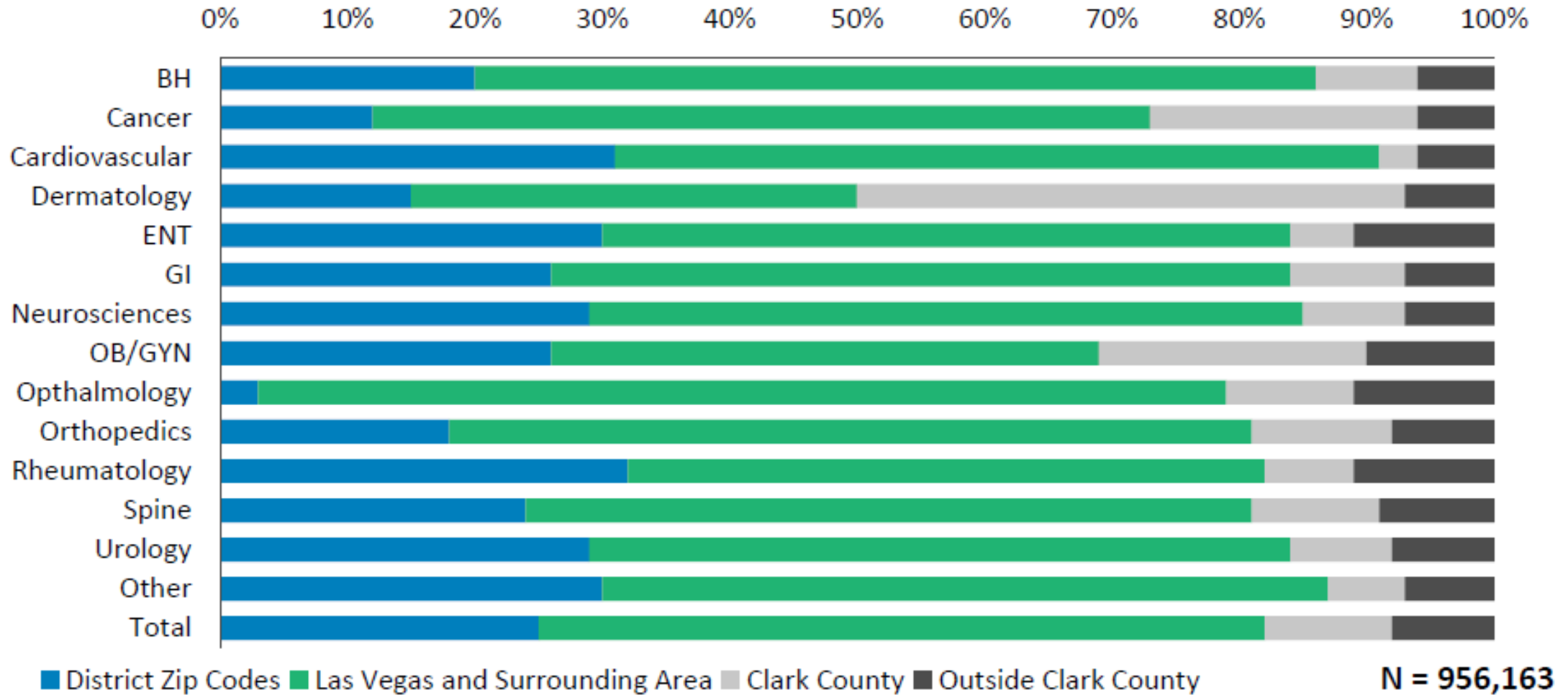
Legend

-  Primary Service Area (PSA)
-  Secondary Service Area (SSA)
-  Tertiary Service Area (TSA)



LAS VEGAS PATIENT OUTMIGRATION

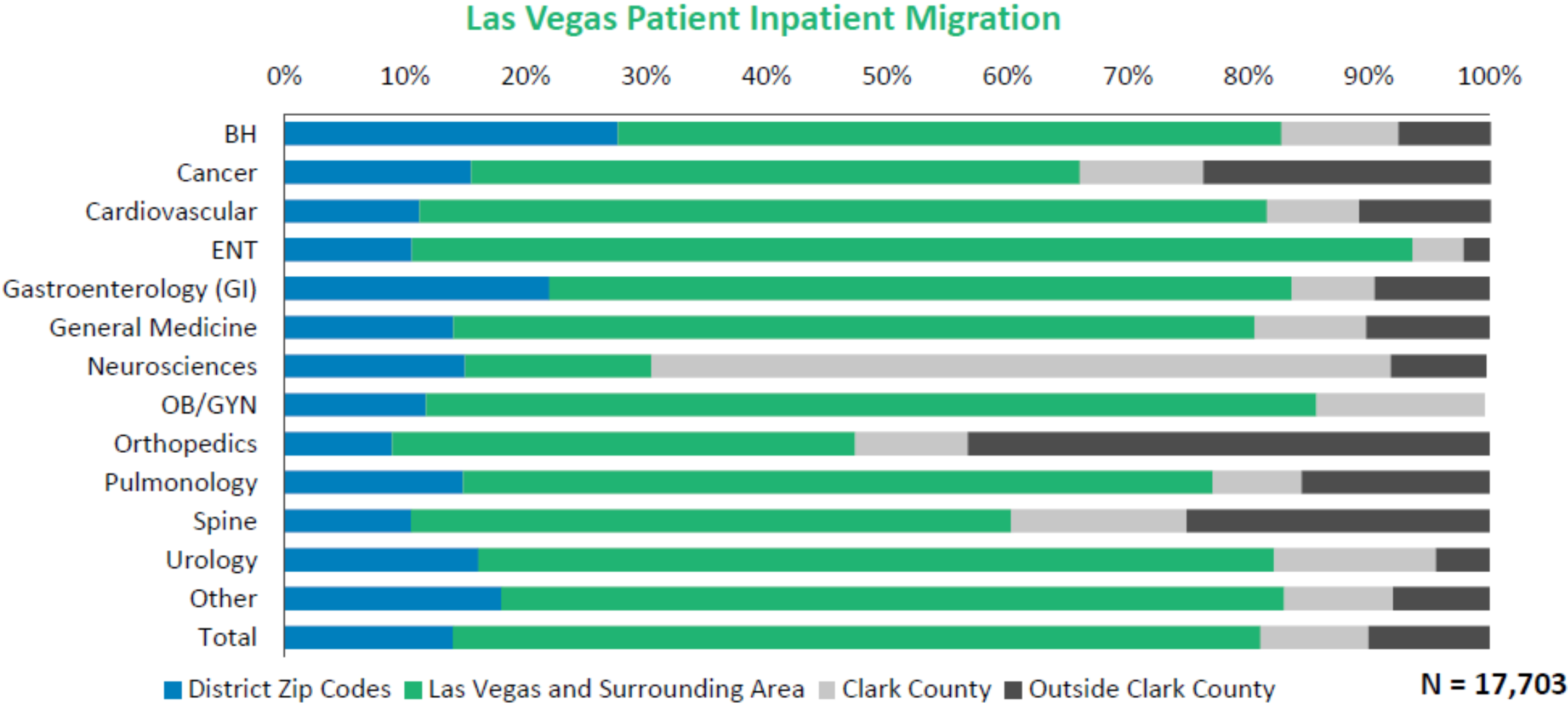
Las Vegas Patient Outpatient Migration



Source: Stratasan 2021 claims data.



LAS VEGAS PATIENT OUTMIGRATION

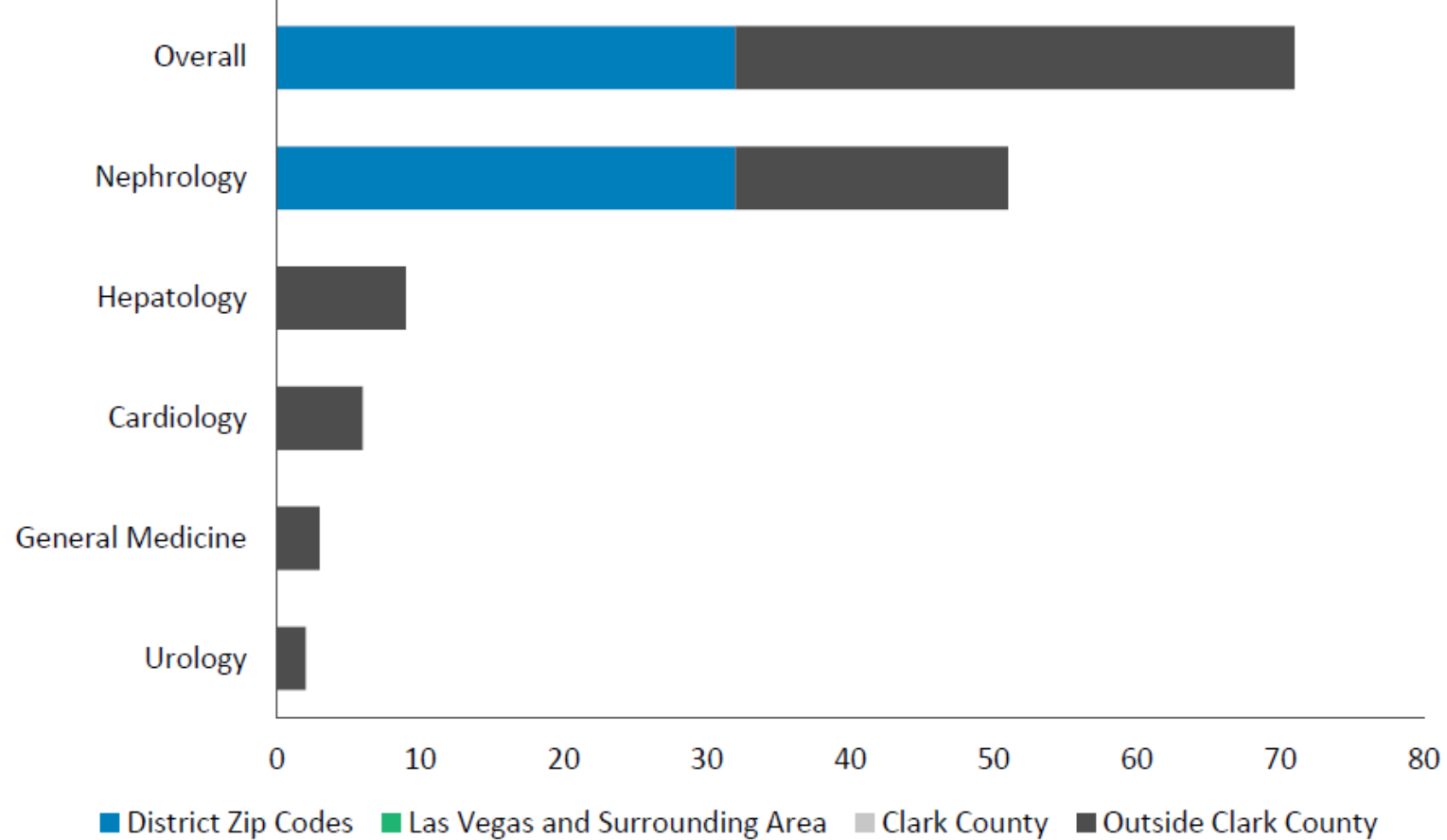


Source: Stratasan 2021 claims data.



LAS VEGAS PATIENT OUTMIGRATION

Las Vegas Patient Transplants, Inpatient 2021

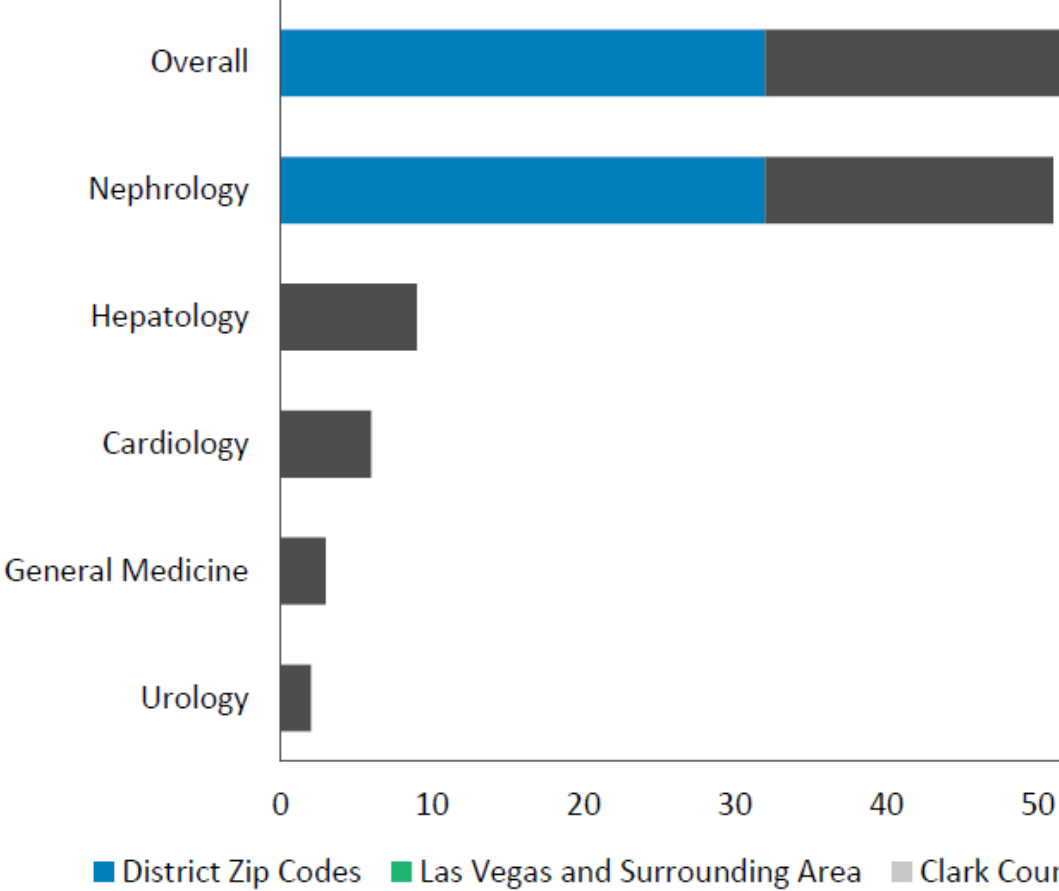


N= 71



LAS VEGAS PATIENT OUTMIGRATION

Las Vegas Patient Transplants, Inpatient 2021



N= 71

Transplant Out-Migration by Facility¹

Facility on Claim	% of Out-Migration
Mayo Clinic	41%
University of California, San Diego	10%
Stanford	10%
Lucile Salter Packard Children's Hospital at Stanford	10%
Faculty Physicians and Surgeons of Llusm	8%
Keck Hospital of USC	8%
Loma Linda University Medical Center	5%
Intermountain Medical Center	5%
University of Utah Hospital	3%



LAS VEGAS MEDICAL DISTRICT

Strengths

- Co-located healthcare services
- Enthusiasm among clinical partners for consolidation of clinical academic programs
- City of Las Vegas sponsorship and support
- Master plan and funding commitments
- Academic programs as a cornerstone
- Diversity and breadth of clinical programs
- Centrally located; good transportation options



UMC ReVITALize Project Rendering



LAS VEGAS MEDICAL DISTRICT

Weaknesses

- Lack of awareness by general public
- Access to care difficult, esp. primary care
- High out-migration levels for all care
- Sense of saturation for some service types - ASC, imaging, inpatient services
- Public safety concerns; Limited parking
- Small land parcels for development; privately held and above-market pricing
- Lack of workforce housing
- Workforce and recruitment challenges due to low reimbursement and perceived barriers to entry



The Presley Multifamily Development Rendering



LAS VEGAS MEDICAL DISTRICT

Opportunities

- Dedicated biomedical research space
- Expansion of lifestyle amenities
- Growth for UNLV programs & assets
- Symphony Park redevelopment plan and incremental capacity for clinical services
- Clarity on the target audience for LVMD
- Broader communication to constituents of LVMD vision and breadth of services
- Enhanced spectrum of care services - subspecialties, research, and post-acute
- Stemming historic out-migration from Las Vegas Valley for all clinical care





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Threats

- Challenging to recruit new physicians
 - Low reimbursement rates
 - High malpractice costs
- Parking availability as LVMD grows
- Changing political administrations may prioritize resources for LVMD differently
- Access: perceived difficulty of getting to LVMD (highway congestion)
- Dispersion of clinical subspecialty programs to high-growth, affluent communities in valley





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Project Goals & Objectives

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LAS VEGAS MEDICAL DISTRICT

Market Assessment Service Area Gaps

1. ENT
2. Pediatric
3. Orthopedics/Spine*
4. Gastroenterology
5. Ophthalmology
6. Behavioral Health
7. Oncology
8. Pulmonology
9. Primary Care





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LAS VEGAS MEDICAL DISTRICT

Biomedical Research Themes

- There is a need for mixed-use and interdisciplinary areas that include bench space for basic research and potential incubator space
- Shared goal of supporting community, creating economic and clinical impact for the city, and ensuring clinical infrastructure keeps pace with city's growth
- Health sciences entrepreneurial base may be small, but taxes and cost of living are advantageous to researchers and start-ups





LAS VEGAS MEDICAL DISTRICT

Biomedical Research Considerations

Portfolio

- What is the ideal mix of members and projects?
- Are there key anchor members who Las Vegas already has recruited or would like to recruit to the area?
- What is the correct mix of public and private partners?



Funding

- What are the current sources of capital available in the area (e.g., angel investors, venture capital)?
- Is the vision for the incubator to offer low-cost rent? Trade space for equity? Gain membership buy-in?



Advisory Base

- What scientific advisers are available in the city? How does that complement the programming?
- Is there a local business advisory base? What remote connections may exist?





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Project Goals & Objectives

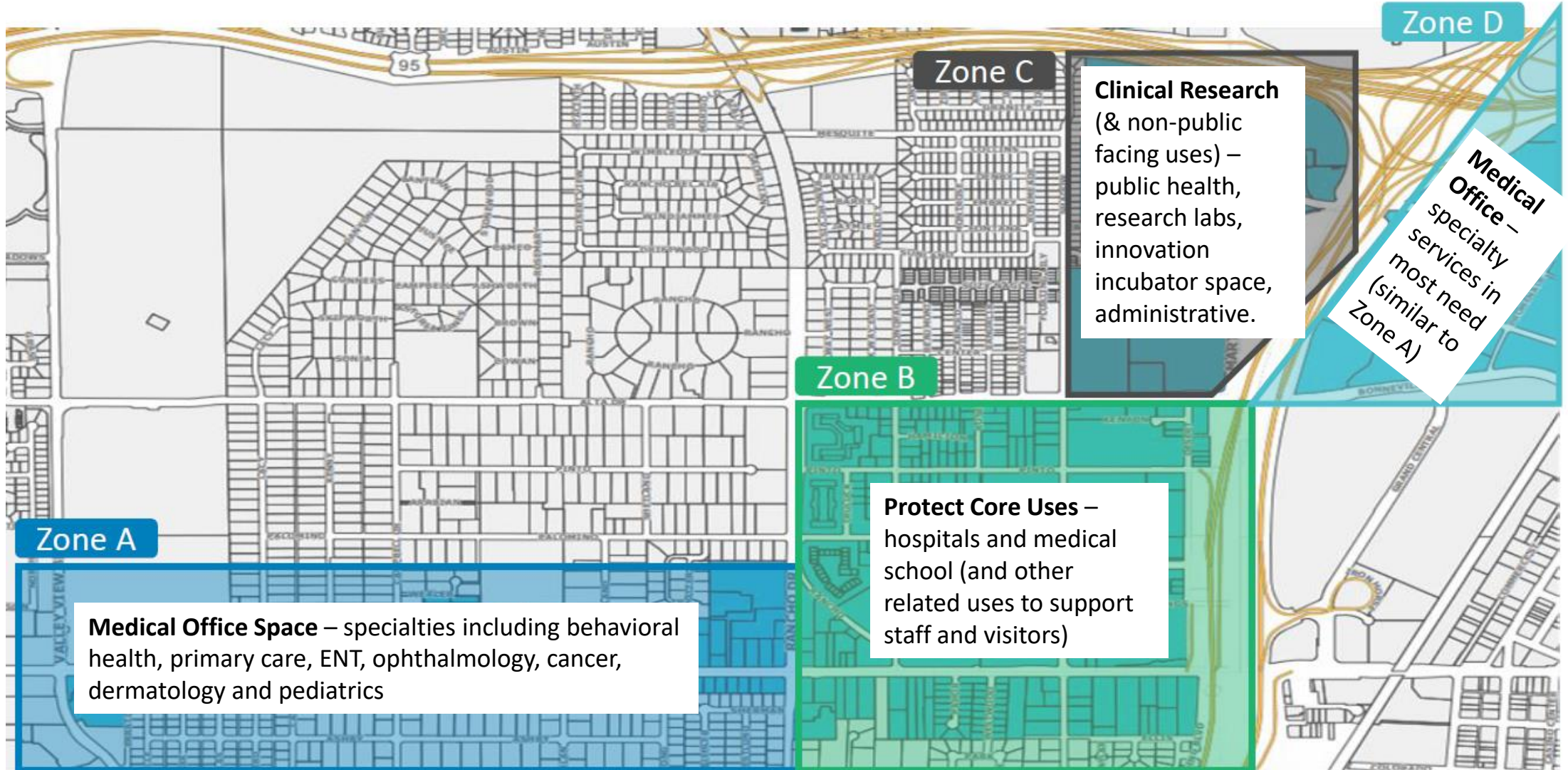
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Prioritized Land Use





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Major Themes

- 1 Improve Physician/
Physician Group
Recruitment
- 2 Create Biomedical
Research Spaces





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Strategic Next Steps

- **Create Bio Health Sciences Steering Committee**
- **Market & Pitch to Site Selectors**
- Lead generation activities
- Strategic land/property acquisition
- Support impactful legislative initiatives
 - Reimbursement rates
 - Academic Medical District
 - R & D tax credits
- Research & support out-of-market talent recruitment
- Research workforce development initiatives
- Improve website functionality



LAS VEGAS MEDICAL DISTRICT

Consultant Report

