



 MORNING CONSULT

NATIONAL
COUNCIL
for Mental
Wellbeing

Member Survey

NATIONAL COUNCIL FOR MENTAL WELLBEING
POLLING PRESENTATION

February 2021

Key Points

- 1 **Two in three organizations (67%) report the demand for their organization's services has increased over the last three months, a 15% increase from August 2020.**
- 2 **Of the members who report their organization offers substance use disorder services, over half report (64%) the use of such services has increased in the past three months, a 13% increase from August 2020.** Similarly, among those who offer youth mental health and substance use services, 63% say the demand has increased over the past 3 months.
- 3 **68% of organizations have had to cancel, reschedule, or turn away patients over the past 3 months.**
- 4 **There was a 15% increase since August 2020 in the percent of organizations who say they could survive financially for more than 2 years under the current situation.**
- 5 **Three in four organizations (77%) received more than \$100,000 from federal programs such as the PPP or Provider Relief Fund.** Among those who received federal funding, a strong majority (87%) said this funding allowed their organization to restore staffing and/or programs.

Methodology

This poll was conducted between February 1st- 18th 2021 among a national sample of 332 National Council Members. The interviews were conducted online. Results from the full survey have a margin of error of plus or minus 5%.

Contents



Impact of COVID-19 On Organization

- Impact on programs, workforce, patients, and finances



Stimulus Funding



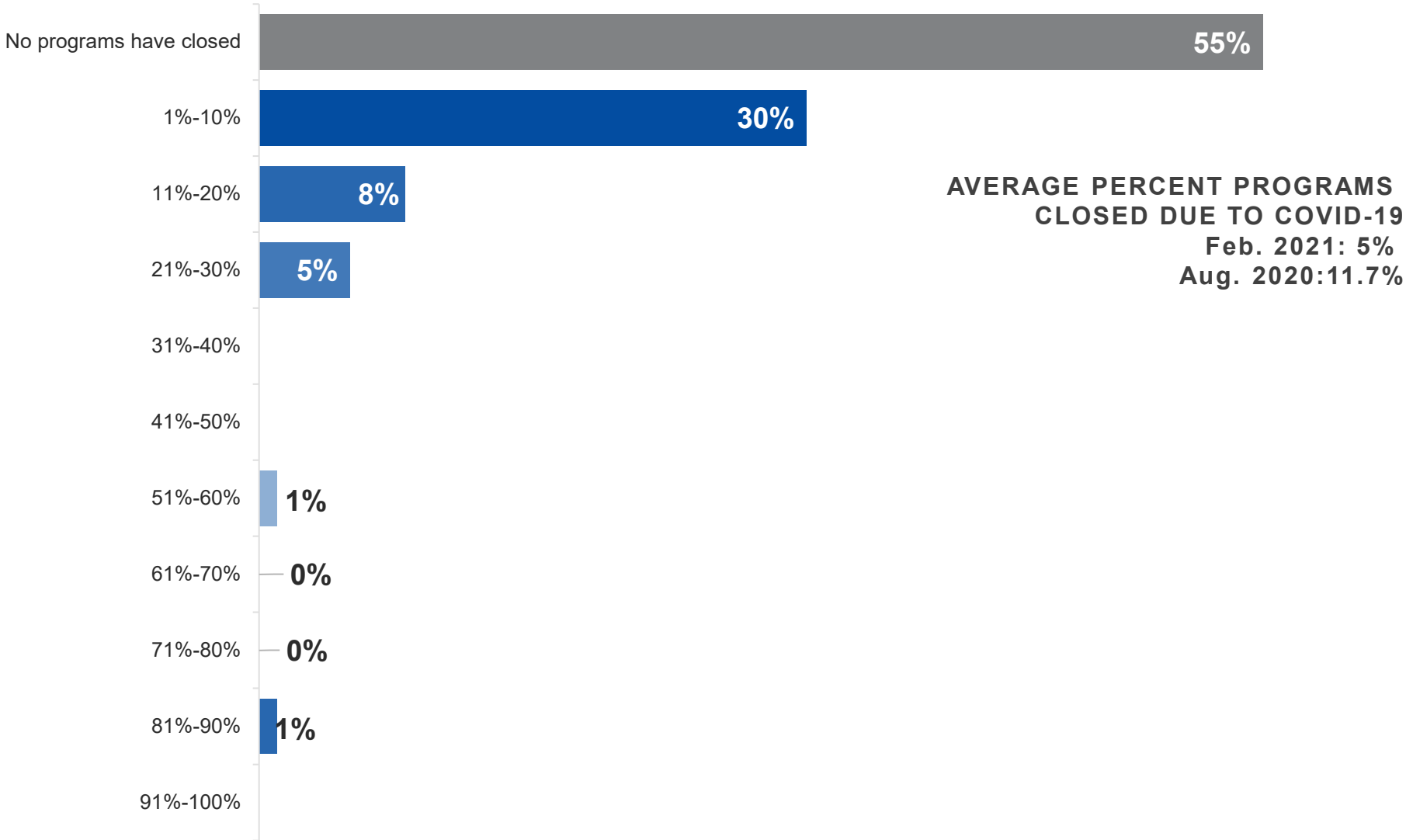
Demographic Information of Organization

Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Nearly half of organizations (45%) say their organization has closed some programs due to COVID-19.

Percent of programs within your organization currently closed due to COVID-19:



Impact of COVID-19 on Organizations

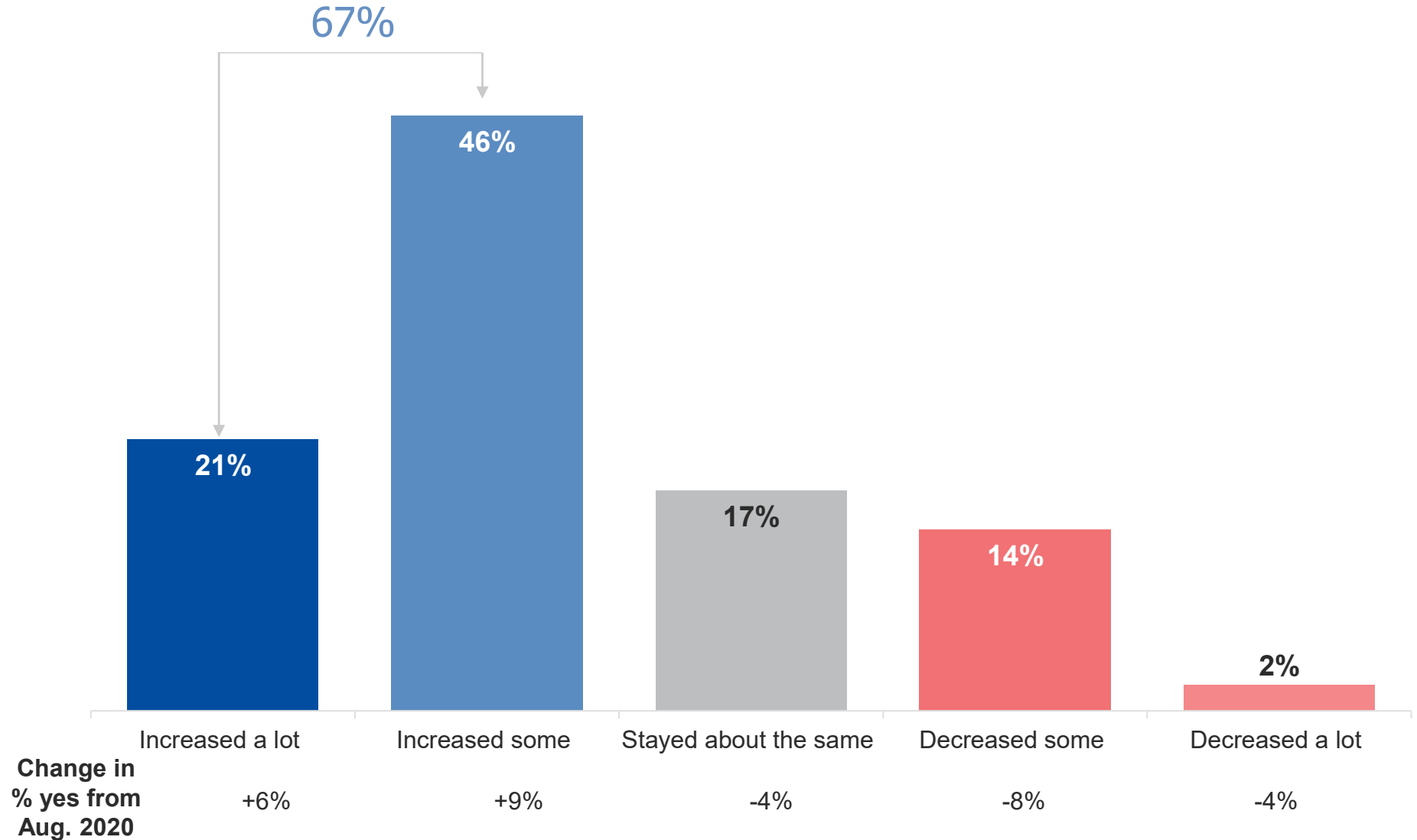
IMPACT ON PROGRAMS

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SLIDE / 5

Two in three (67%) report the demand for their organization's services has increased over the last three months, a 15% increase from August 2020.

Has the demand for your organization's services increased, decreased, or remained the same over the last 3 months?

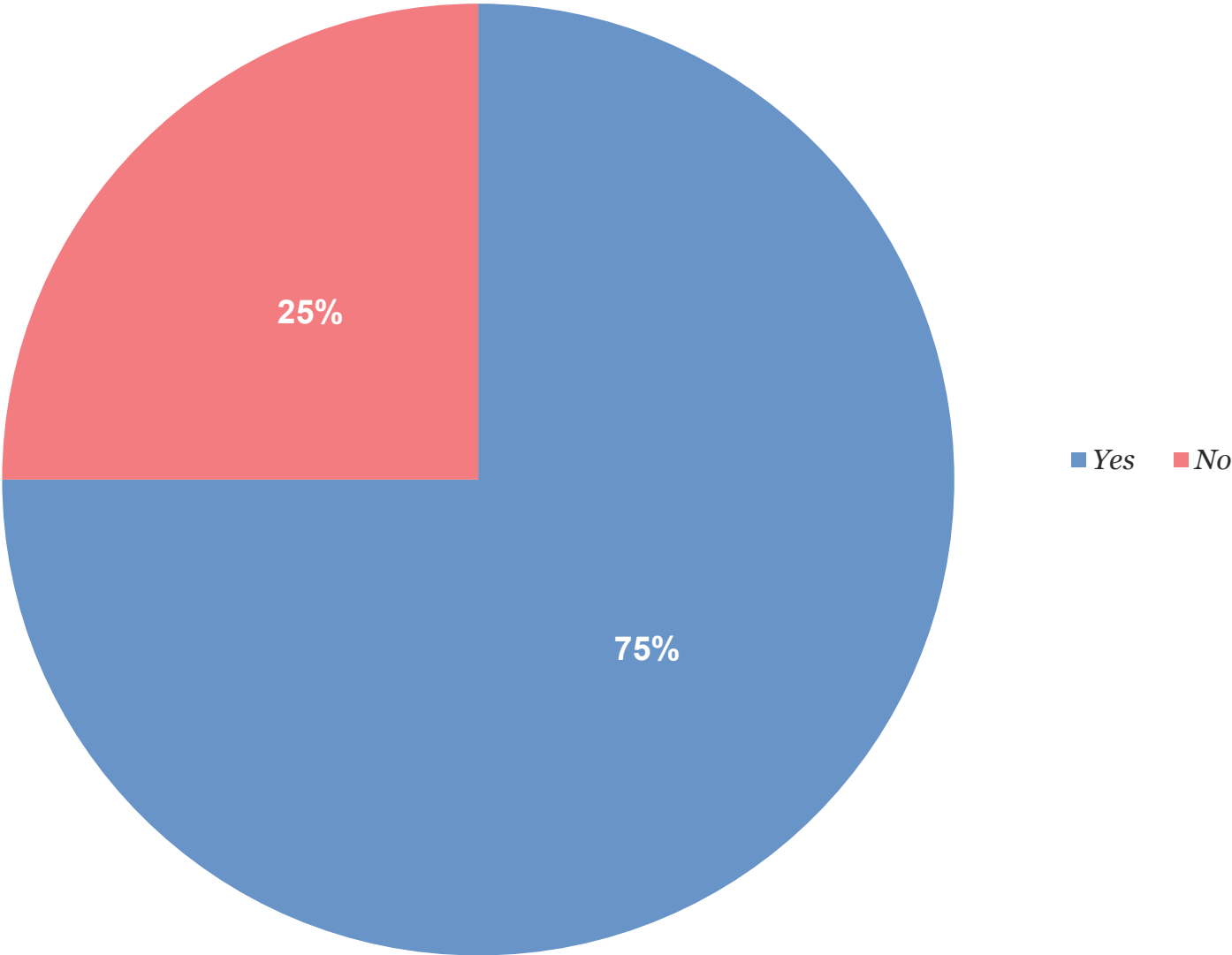


Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Three in four members report their organization provides substance use disorder treatment.

Does your organization provide substance use disorder treatment?

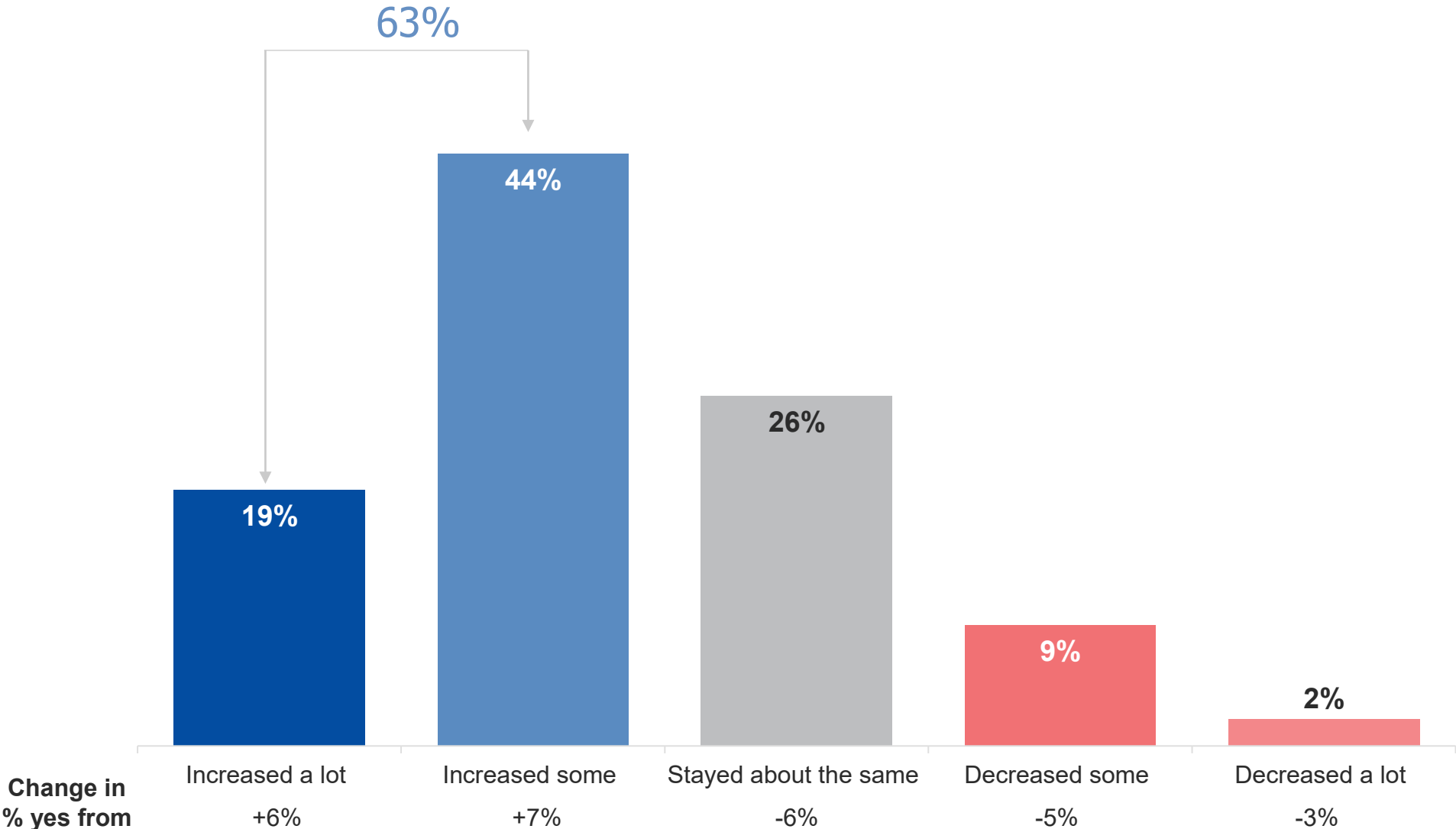


Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Of the members who report their organization offers substance use disorder services, over half report (63%) the use of such services has increased in the past three months, a 13% increase from August 2020.

Has demand for substance use disorder services increased, decreased, or remained the same over the past 3 months?



Change in
% yes from
Aug. 2020

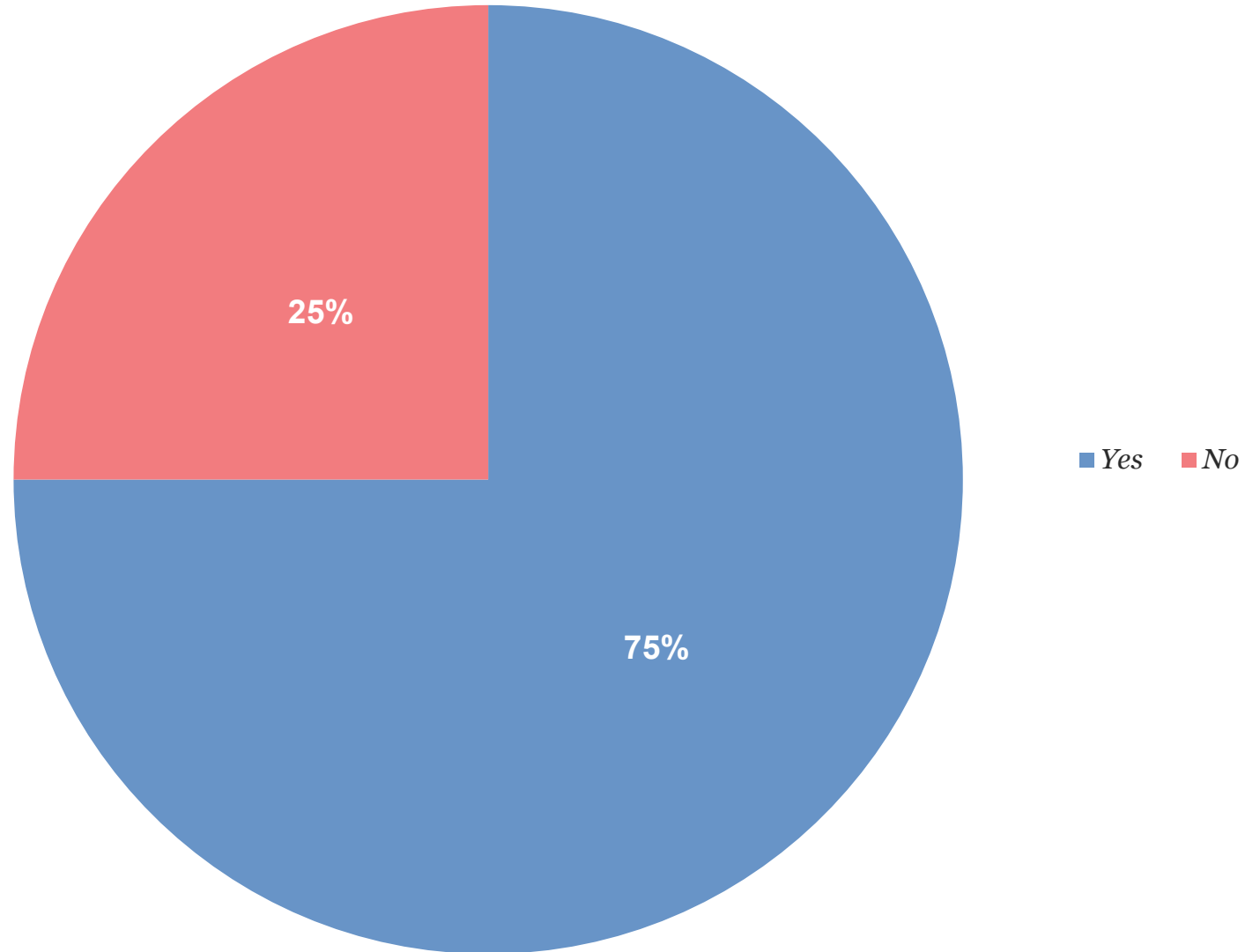
Among those whose organization offers substance use disorder services, n=247

Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Three-quarters of members surveyed say their organization provides services for youth mental health and substance use disorder treatment.

Does your organization provide services for youth mental health and substance use disorder treatment?

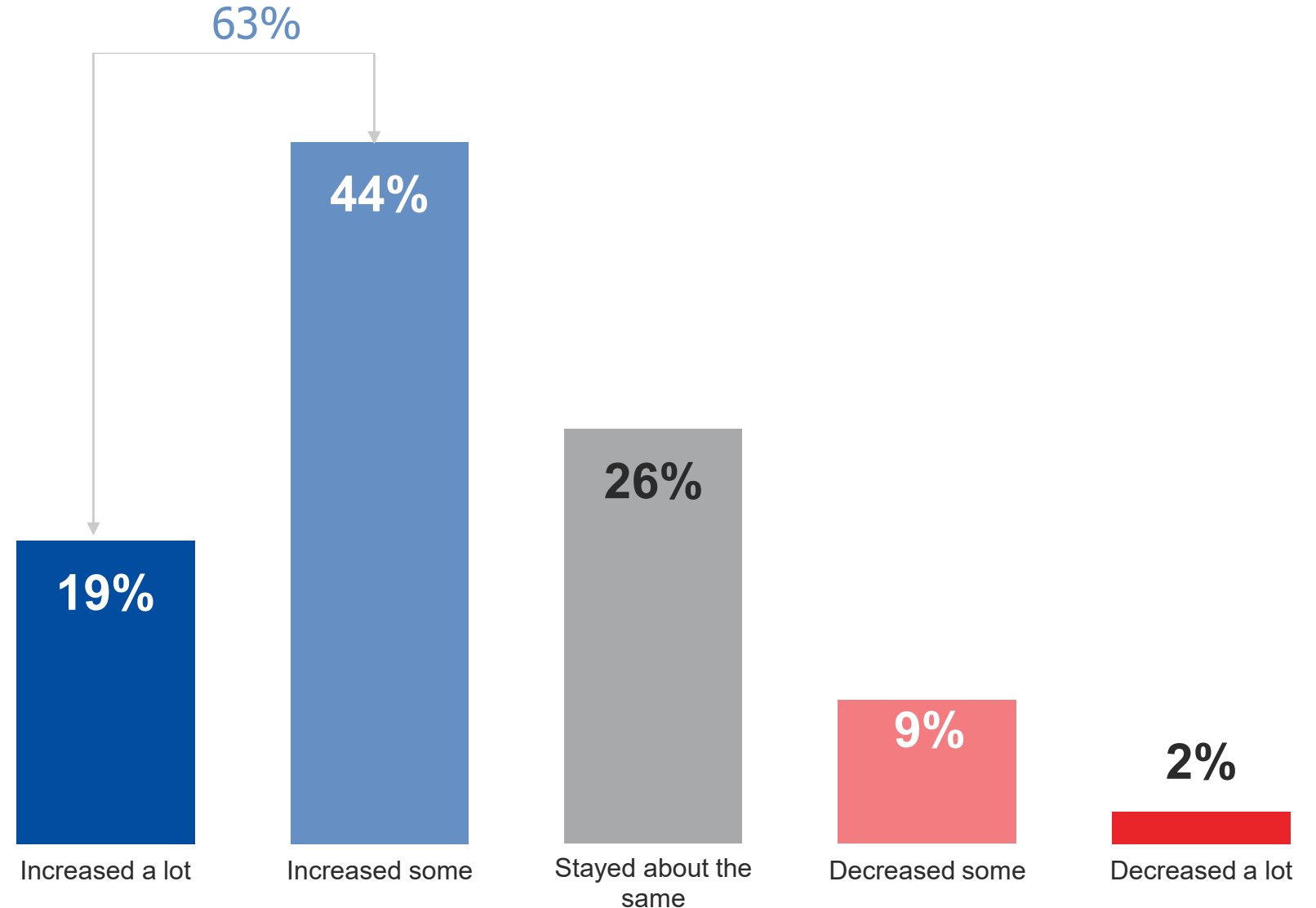


Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Among those who do offer youth mental health and substance use services, 63% say the demand has increased over the past 3 months.

Has the demand for youth mental health and substance use services increased, decreased, or remained the same over the last 3 months?



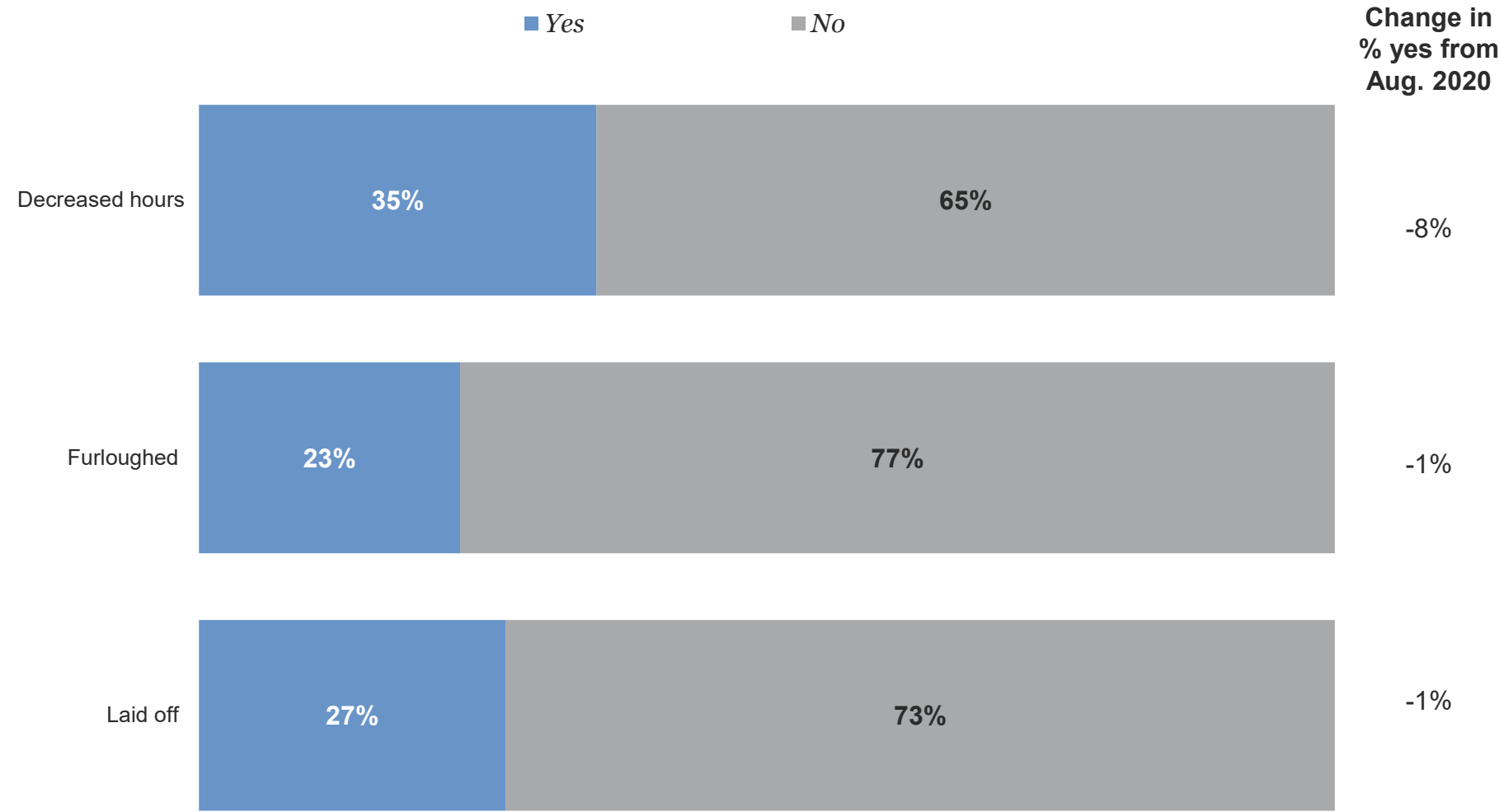
Among those whose organization offers youth mental health and substance use disorder services, n=248

Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

A quarter (27%) of organizations have laid off employees, a quarter (23%) have furloughed employees, and 35% have decreased hours of employees a result of COVID-19. The percent who said they have decreased hours of employees decreased 8% since August 2020.

Have you laid off or furloughed employees as a result of the COVID-19 outbreak?

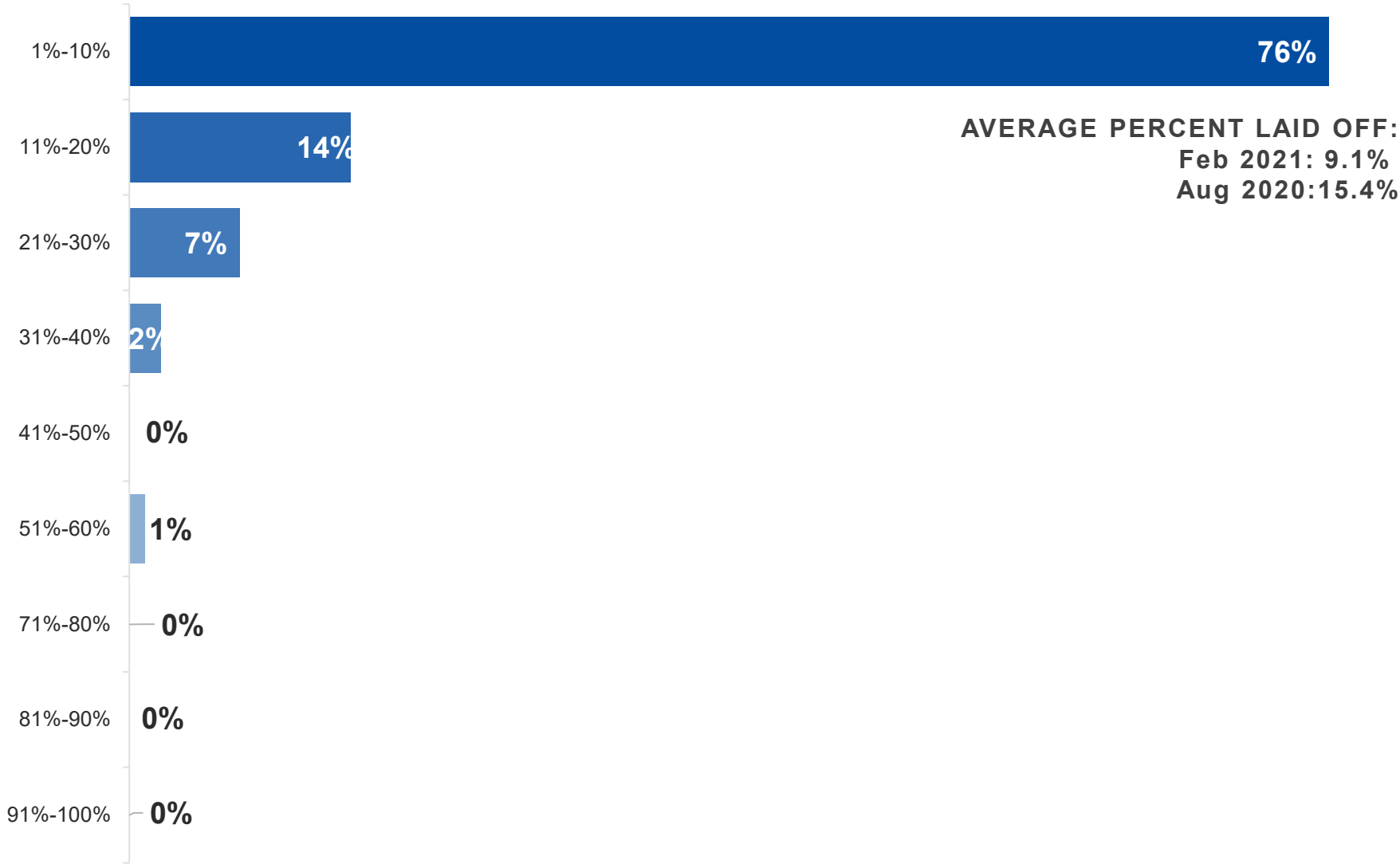


Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

Among those who have laid off employees due to COVID-19, on average they have laid off 9.1% of their workforce.

About what percent of your work force have you ***laid off*** as a result of the COVID-19 outbreak?



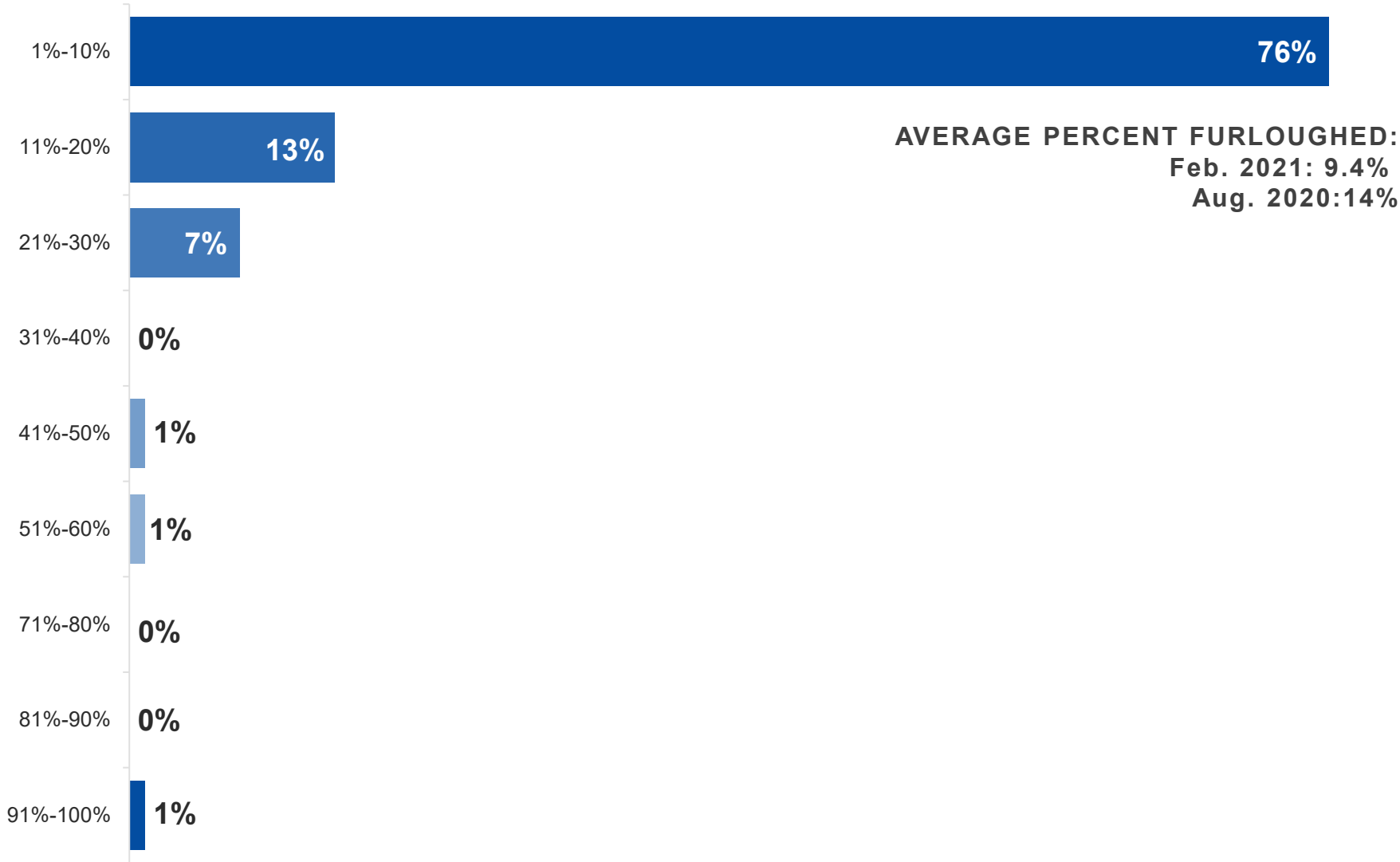
Among those who have laid off employees, n=90

Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

Similarly, among those who have furloughed employees due to COVID-19, on average they have furloughed 9.4% of their workforce.

*About what percent of your work force have you **furloughed** as a result of the COVID-19 outbreak?*



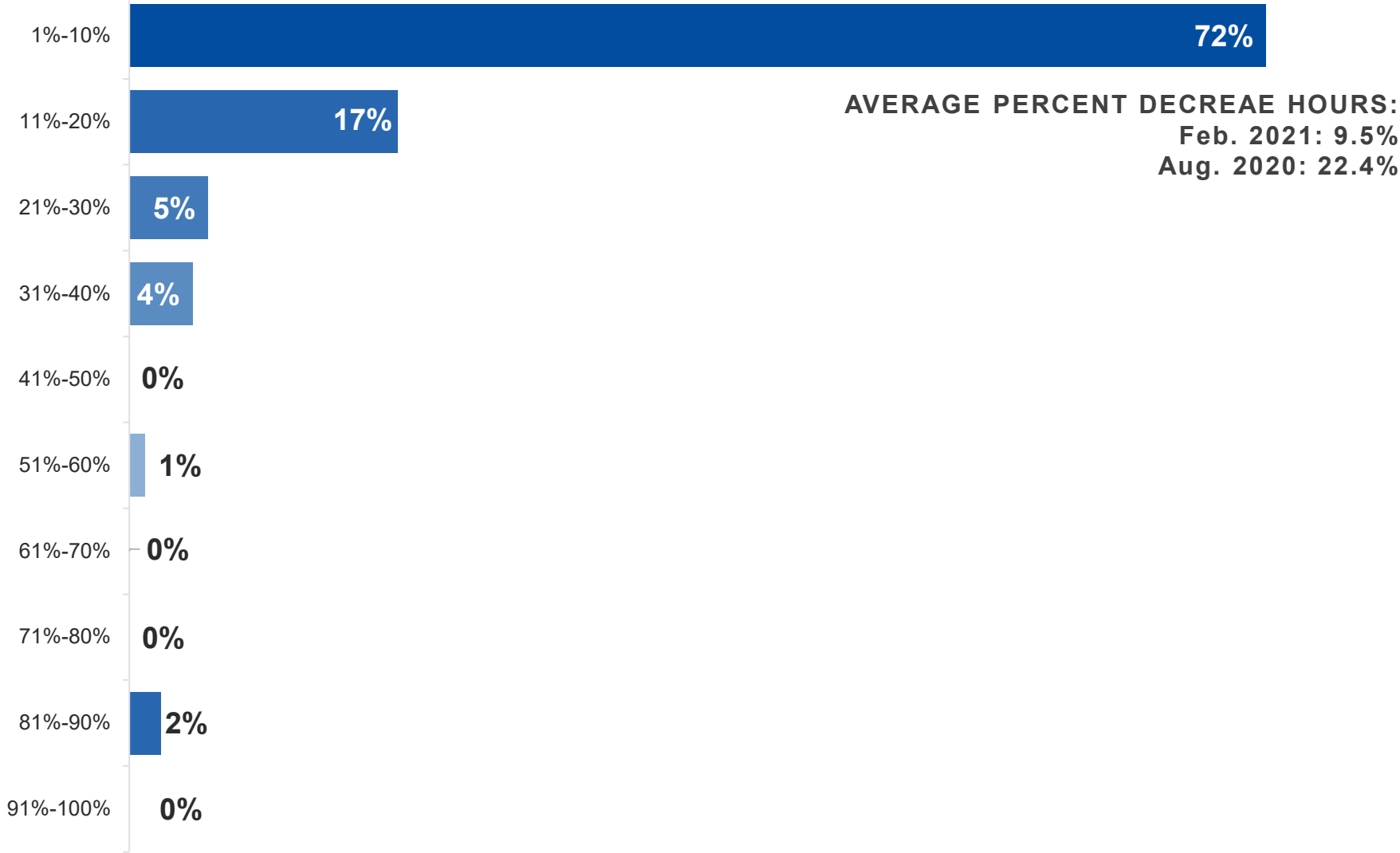
Among those who have furloughed employees, n=76

Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

Among organizations who have decreased hours of employees due to COVID-19, on average they have decreased hours of 9.5% of their workforce, a 50% decrease from August 2020.

About what percent of your work force have you *decreased hours of* as a result of the COVID-19 outbreak?



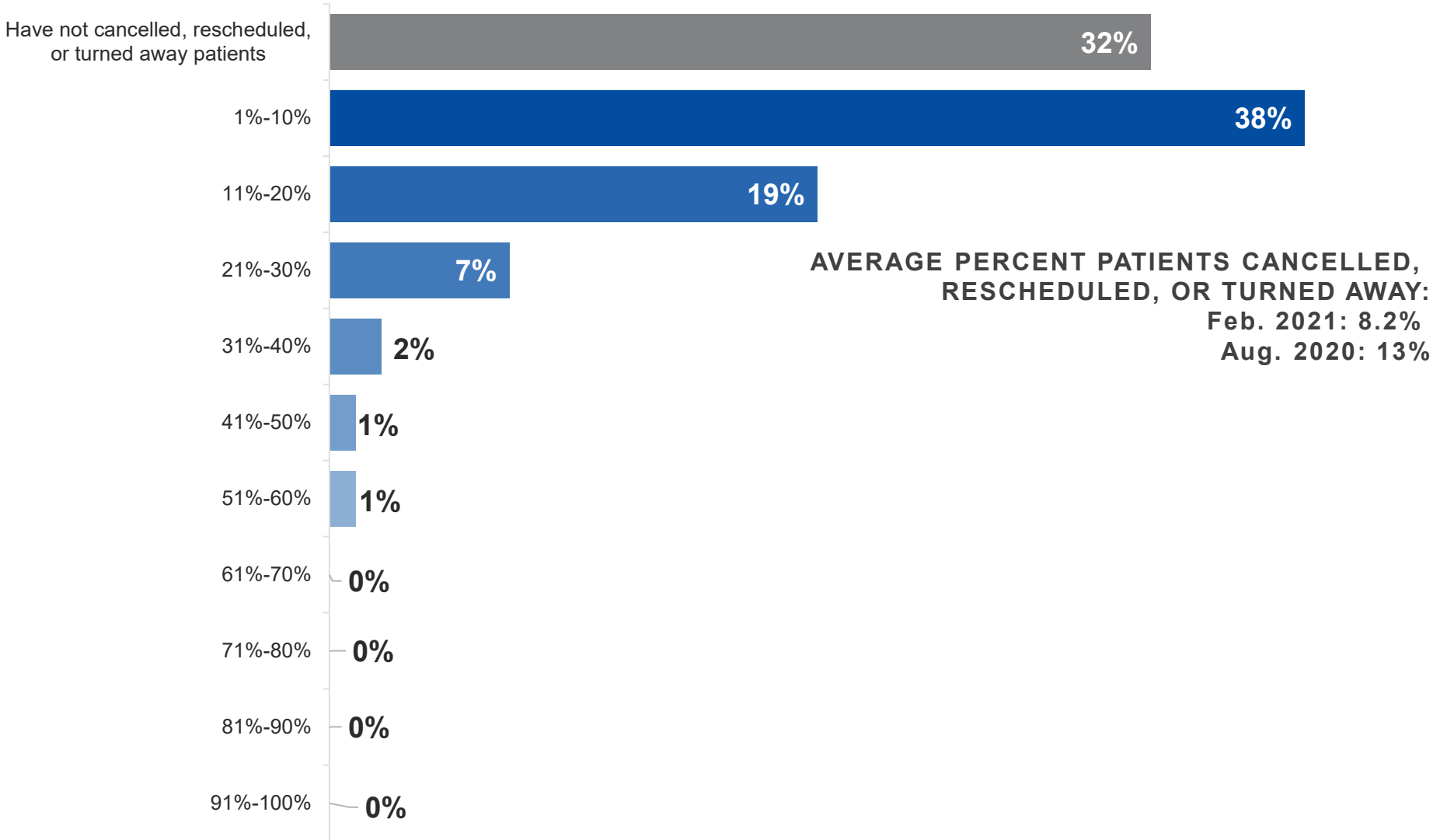
Among those who decreased hours of employees, n=115

Impact of COVID-19 on Organizations

IMPACT ON PATIENTS

68% of organizations have had to cancel, reschedule, or turn away patients over the past 3 months.

What percentage of patients have you needed to cancel, reschedule, or turn away in the last three months during the COVID-19 outbreak?

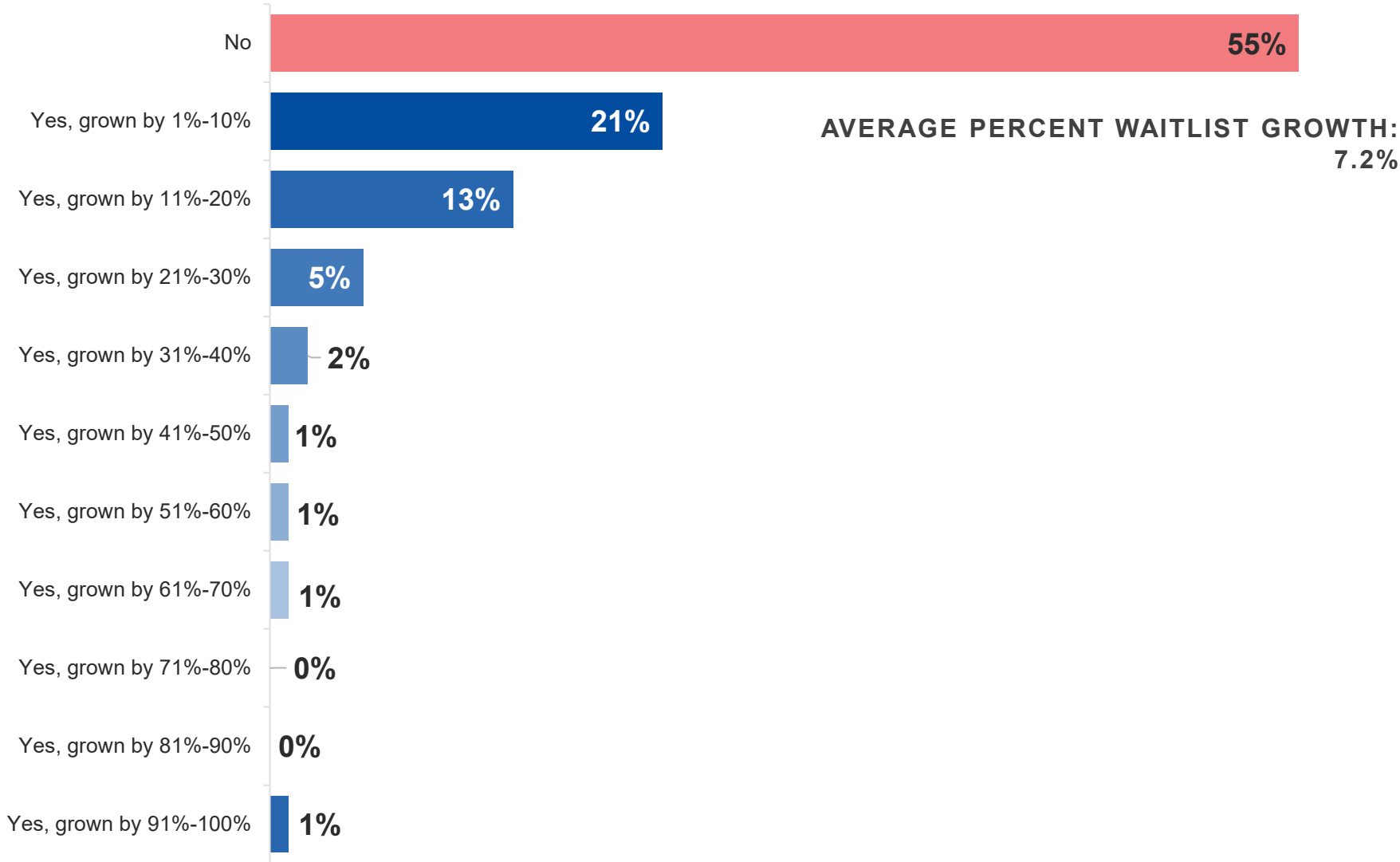


Impact of COVID-19 on Organizations

IMPACT ON PATIENTS

Nearly half (45%) of organization surveyed say their patient waitlist has grown in the past 3 months.

Has your organization's patient waitlist grown in the past 3 months? If yes, by what percent has your waitlist grown?

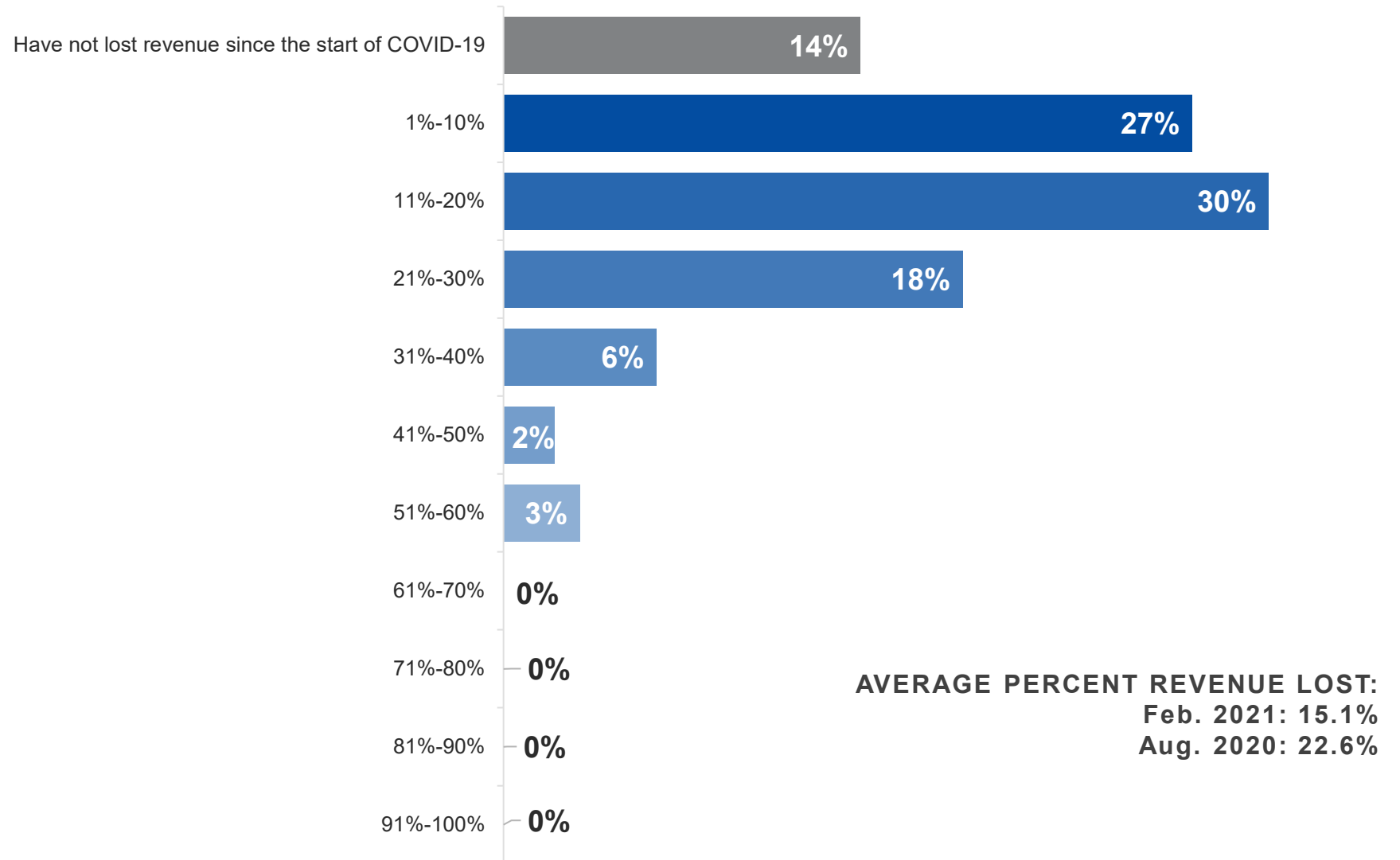


Impact of COVID-19 on Organizations

IMPACT ON FINANCES

On average, organizations have lost 15.1% of their revenue over the past three months during COVID-19.

About what percentage of revenue has been lost during the COVID-19 outbreak over the past three months? (As % of expected revenues for the three month period)

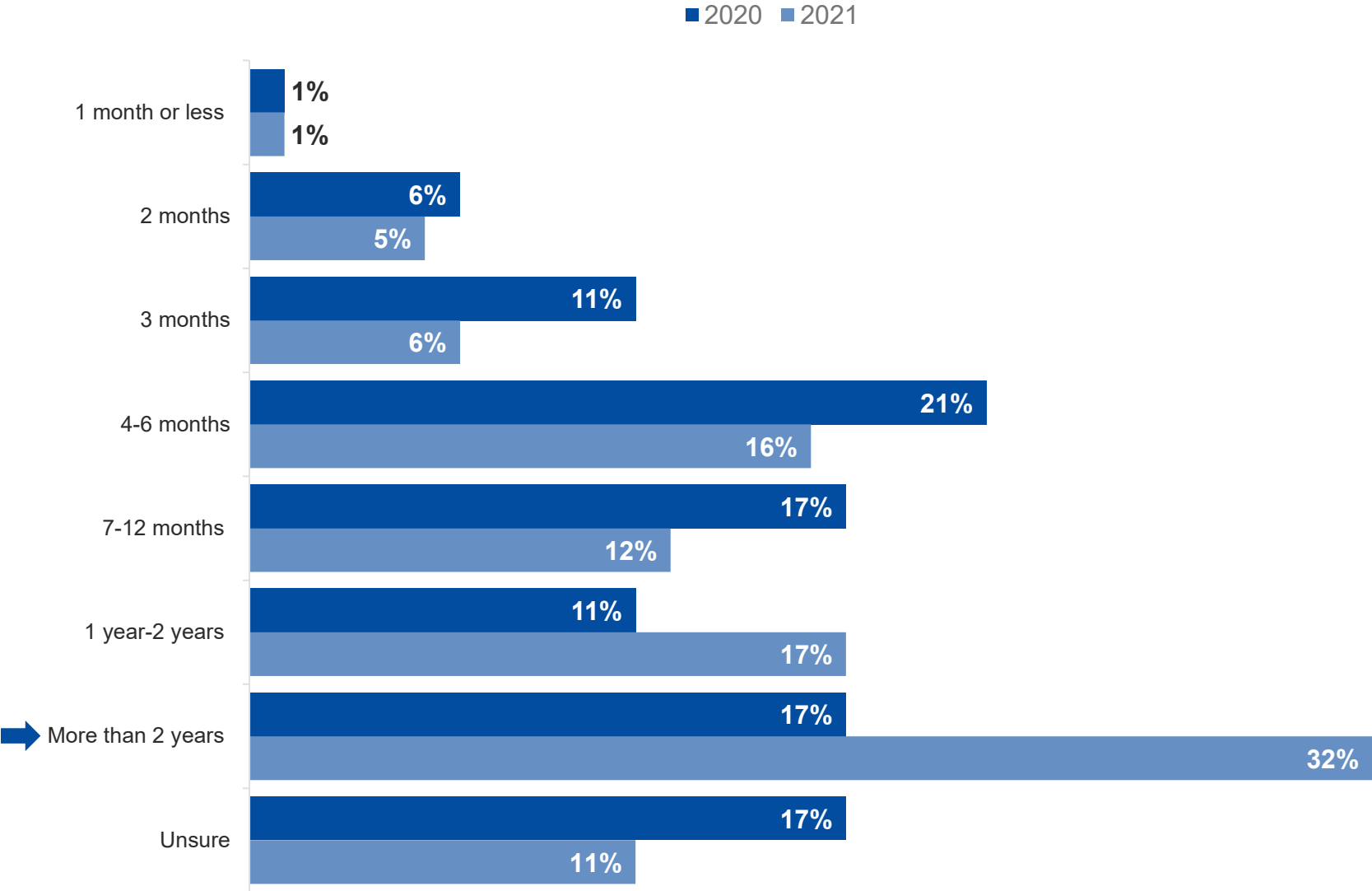


Impact of COVID-19 on Organizations

IMPACT ON FINANCES

There was a 15% increase in organizations who say they could survive financially for more than 2 years under the current situation.

About how many more months can your organization survive financially under the current situation?

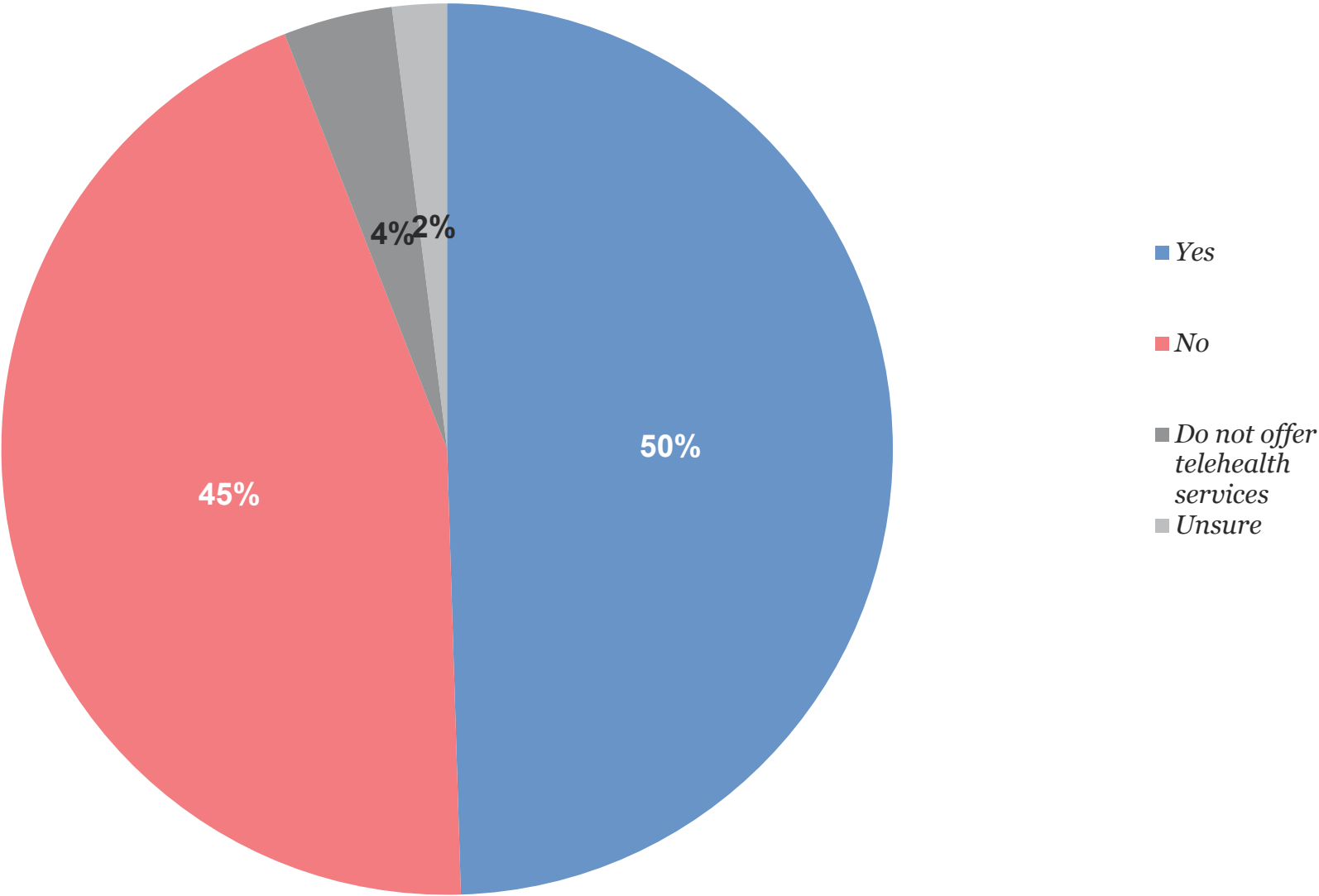


Impact of COVID-19 on Organizations

IMPACT ON FINANCES

Half of organizations say telehealth services are providing an equal amount of revenue from in-person services.

Are telehealth services providing revenue equal to that from in-person services?



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Stimulus Funding

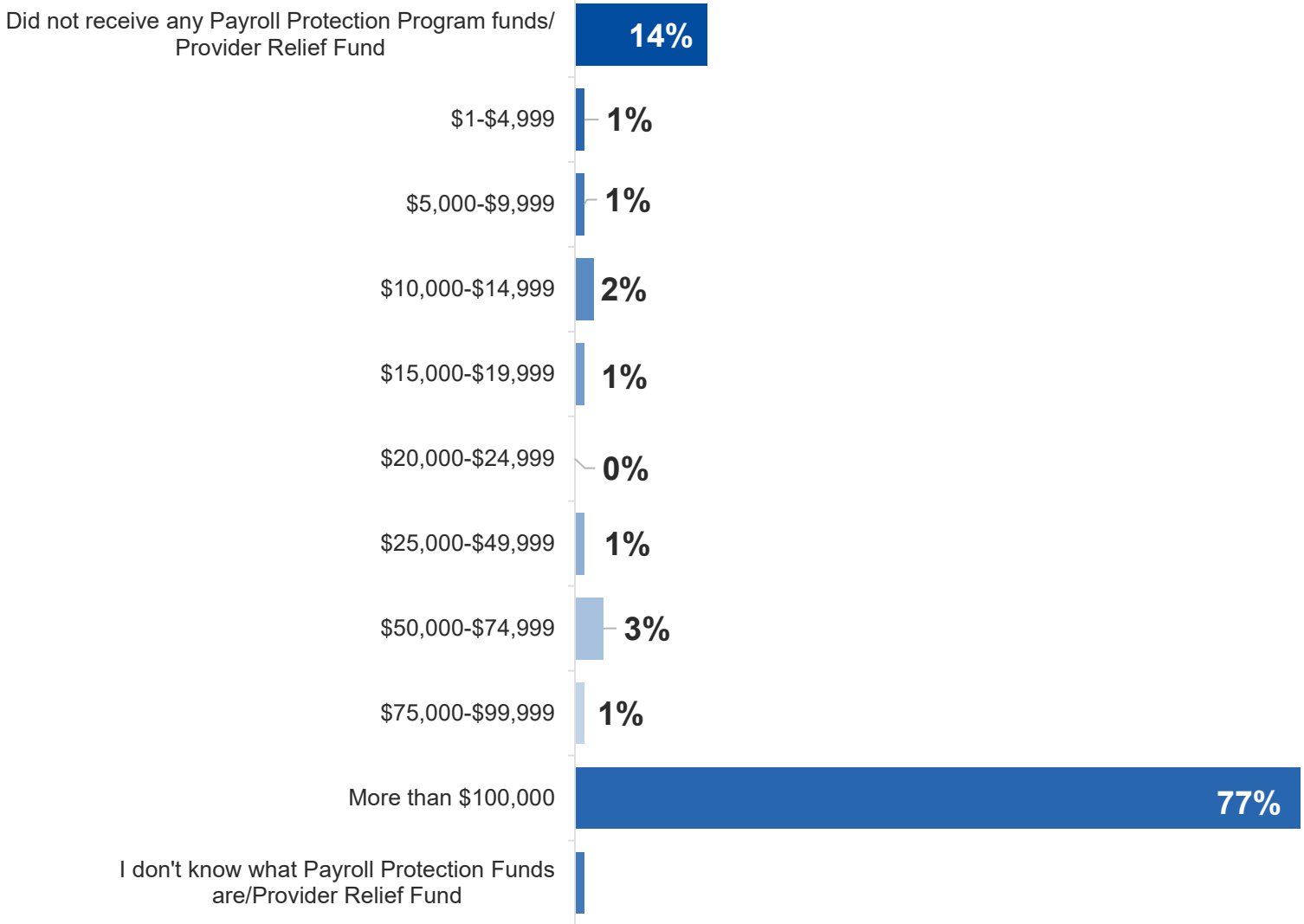


Demographic Information of Organization

Stimulus Funding

Three in four organizations (77%) received more than \$100,000 from federal programs such as the PPP or Provider Relief Fund.

Approximately how much total funding, if any, did your organization receive from federal programs such as the Payroll Protection Program (PPP) or the Provider Relief Fund?



Stimulus Funding

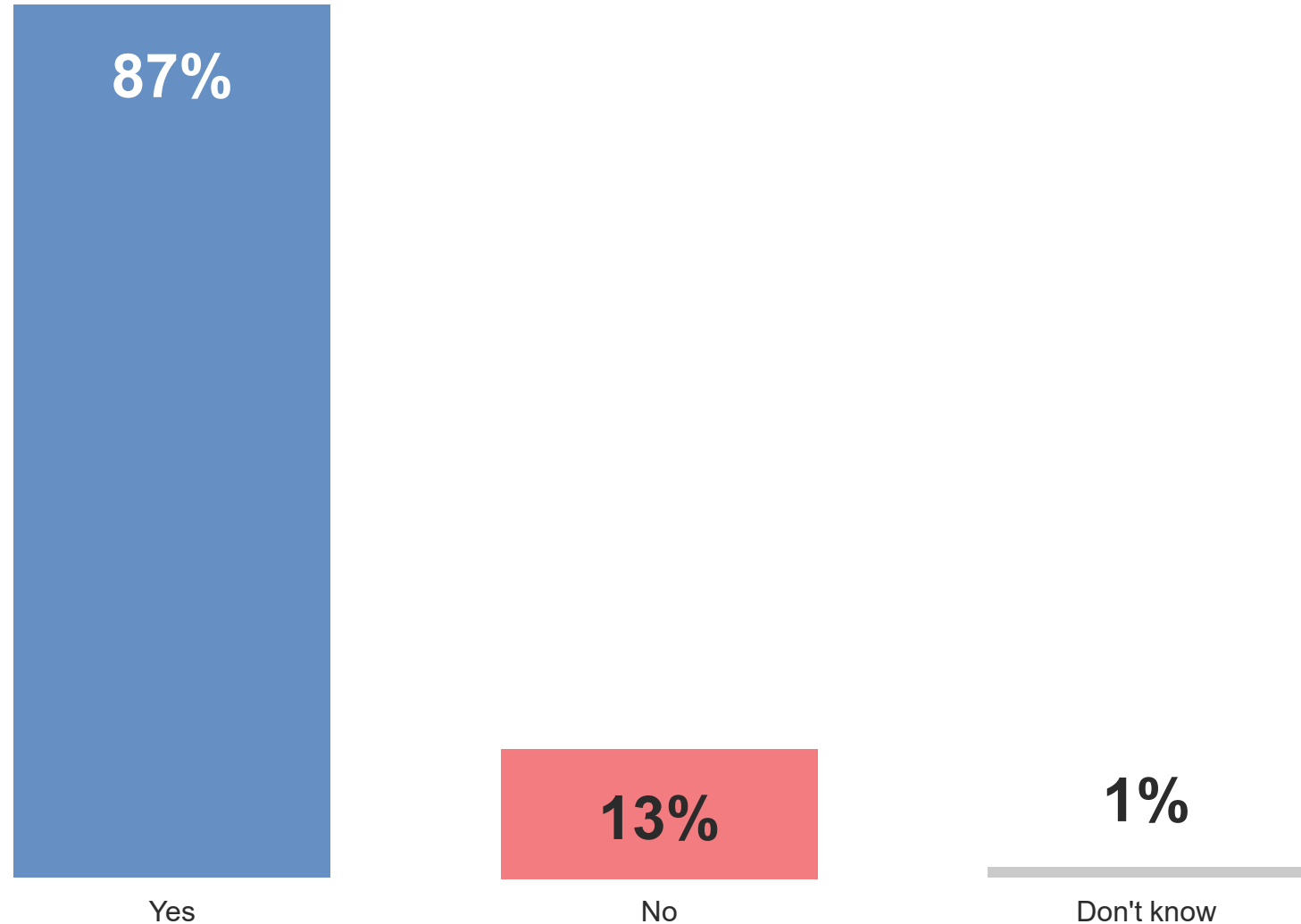
80% of organizations with an annual operating budget between \$5-\$50 million received more than \$100,000 from federal programs.

Approximately how much total funding, if any, did your organization receive from federal programs such as the Payroll Protection Program (PPP) or the Provider Relief Fund?

Among of PPP Funding Received By Organizations Annual Operating Budget			
	Annual Operating Budget Under \$5 Million (n=71)	Annual Operating Budget \$5-\$50 Million (n=241)	Annual Operating Budget Over \$50 Million (n=20)
Did not receive any Payroll Protection Program funds	10%	14%	25%
\$1-\$9,999	2%	2%	0%
\$10,000-\$19,999	3%	1%	10%
\$20,000-\$49,999	3%	1%	0%
\$50,000-\$99,999	11%	2%	0%
More than \$100,000	69%	80%	65%
I don't know what Payroll Protection Funds are	1%	0%	0%

Among those who received federal funding, a strong majority (87%) said this funding allowed their organization to restore staffing and/or programs.

Did the funding your organization received from the federal government allow your organization to restore staffing and/or programs?



Among those who received federal funding, n=284

**Stimulus
Funding**

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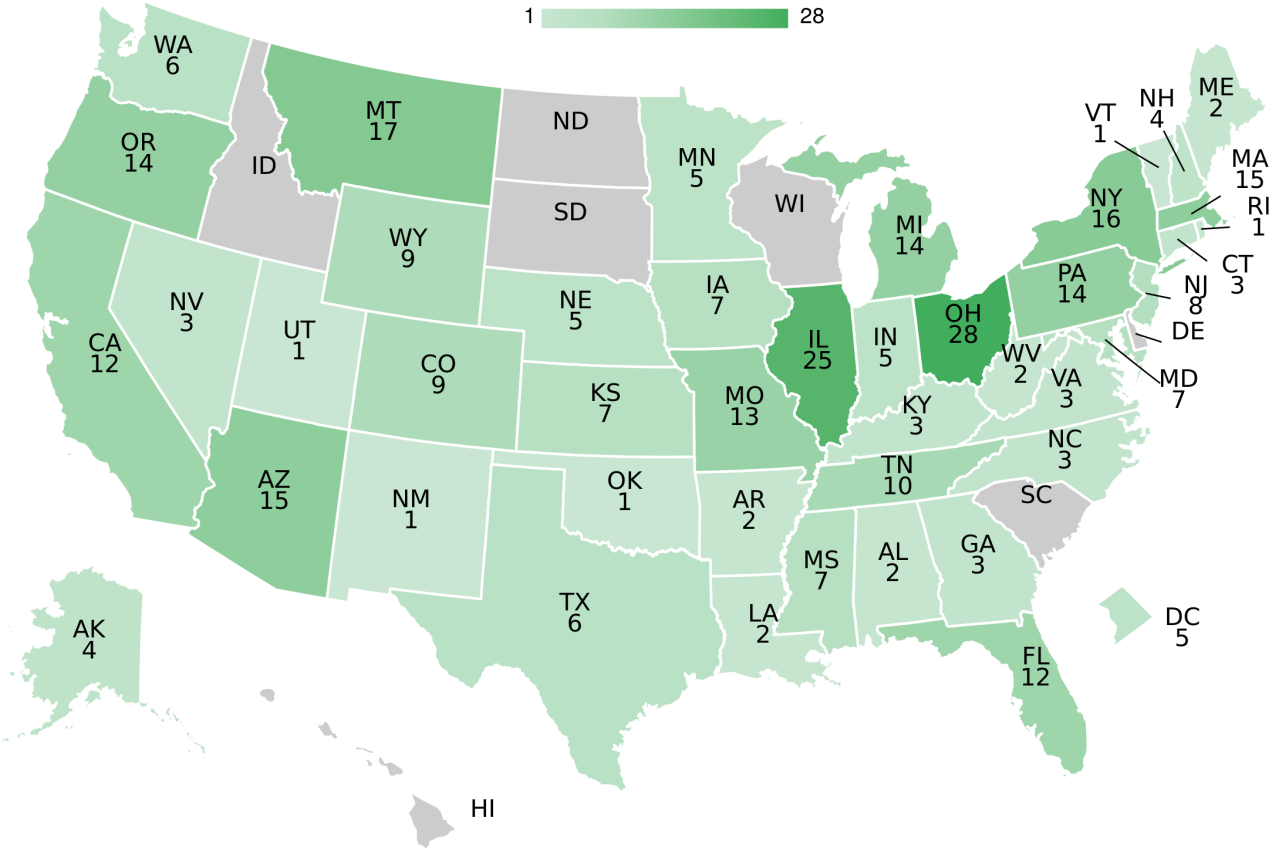


Demographic Information of Organization

Demographic Information of Organization

National Council Member Respondents

By State, February 1, 2021 - February 18, 2021



Demographic Information of Organization

What is the size of your organization's annual operating budget?

