

COVID-19 ECONOMIC IMPACT ON BEHAVIORAL HEALTH ORGANIZATIONS

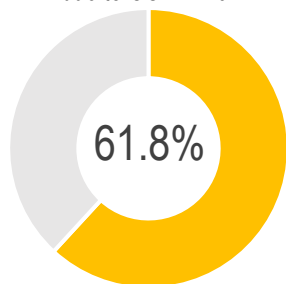
April 15, 2020

ndp | analytics and the National Council for Behavioral Health jointly conducted an online survey of 880 behavioral health organizations across the country in April 2020 to quantify the impact of COVID-19 on patients, employment, safety and financial viability.

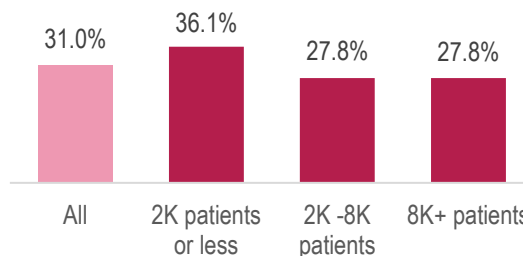
PROGRAM & PATIENT IMPACT

Organizations have cancelled, rescheduled, or turned away 31.0% of patients. 61.8% have closed at least one program. Nearly all (92.6%) have reduced their operations. The impacts are more severe for smaller organizations (serving 2,000 patients or less annually) who have cancelled, rescheduled, or turned away 36.1% of patients.

Percent of organizations that closed at least one program due to COVID-19



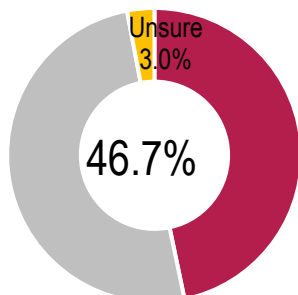
Average share of patients that organizations had to cancel, reschedule, or turn away (as % of patients), by size



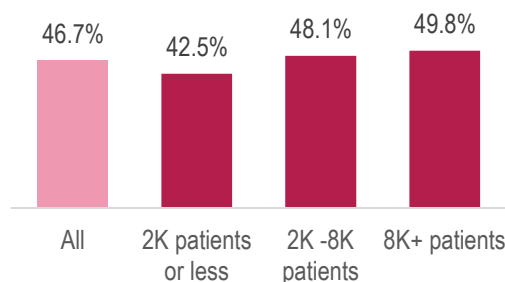
EMPLOYMENT IMPACT

46.7% of behavioral health organizations have had to, or plan to, lay off or furlough employees as a result of COVID-19. Layoffs and furloughs are most prevalent at larger organizations (serving over 8,000 patients annually) where 49.8% have had to, or plan to, layoff or furlough employees. (Figure 3)

Organizations that have had to or plan to lay off or furlough employees as a result of COVID-19



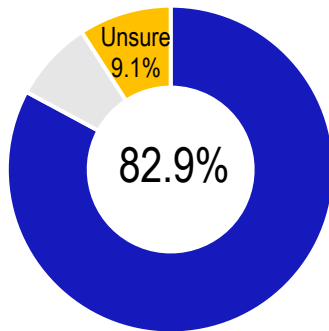
Percent of organizations that have had to or plan to lay off or furlough employees, by size



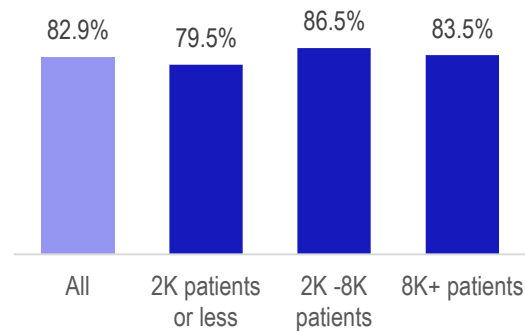
PERSONAL PROTECTIVE EQUIPMENT (PPE)

82.9% of behavioral health organizations do not have enough personal protective equipment (PPE) for two months of operations. Lack of PPE is most prevalent at medium-sized organizations (serving between 2,000 and 8,000 patients annually) where 86.5% of organizations do not believe they have enough PPE for two months.

Organizations without enough PPE for 2 months



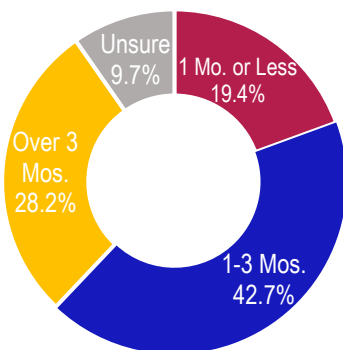
Percent of organizations that do not have enough PPE for 2 months, by size



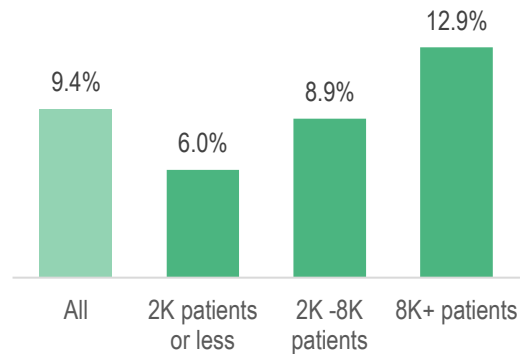
RESILIENCE

62.1% of behavioral health organizations believe that they can only survive financially for three months or less under the current COVID-19 conditions. Only 9.4% of organizations believe they could survive a year or more. While 12.9% of larger organizations expect to survive past the one-year mark, only 6.0% of smaller organizations believe that is possible.

Number of months organizations believe they could survive financially under the current conditions



Percentage of organizations that indicated they could survive a year or more under the current conditions, by size



METHODOLOGY

This quantitative analysis is based on survey of 880 behavioral health organizations located across the United States. The online survey was conducted jointly by ndp | analytics and the National Council for Behavioral Health from April 6 to April 12, 2020.