



 MORNING CONSULT



Member Survey

NATIONAL COUNCIL FOR BEHAVIORAL HEALTH
POLLING PRESENTATION

September 2020

Key Points

- 1 **Fifty-two percent of organizations have seen an increase in the demand for services.** In that, 52% also believe the amount of drug overdoses has increased in their area in the past three months.
- 2 **A quarter of organizations (26%) do not have enough personal protective equipment to last the next 2 months.**
- 3 **Twenty-six percent of organizations have laid off employees, 24% have furloughed employees, and 43% have decreased the hours for staff.**
- 4 **65% of organizations have had to cancel, reschedule, or turn away patients over the past 3 months.**
- 5 **On average, organizations have lost 22.6% of their revenue over the past three months during COVID-19. In that, 39% believe they can only survive six months or less.**

Methodology

This poll was conducted between August 17th- September 1, 2020 among a national sample of 343 NCBH 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



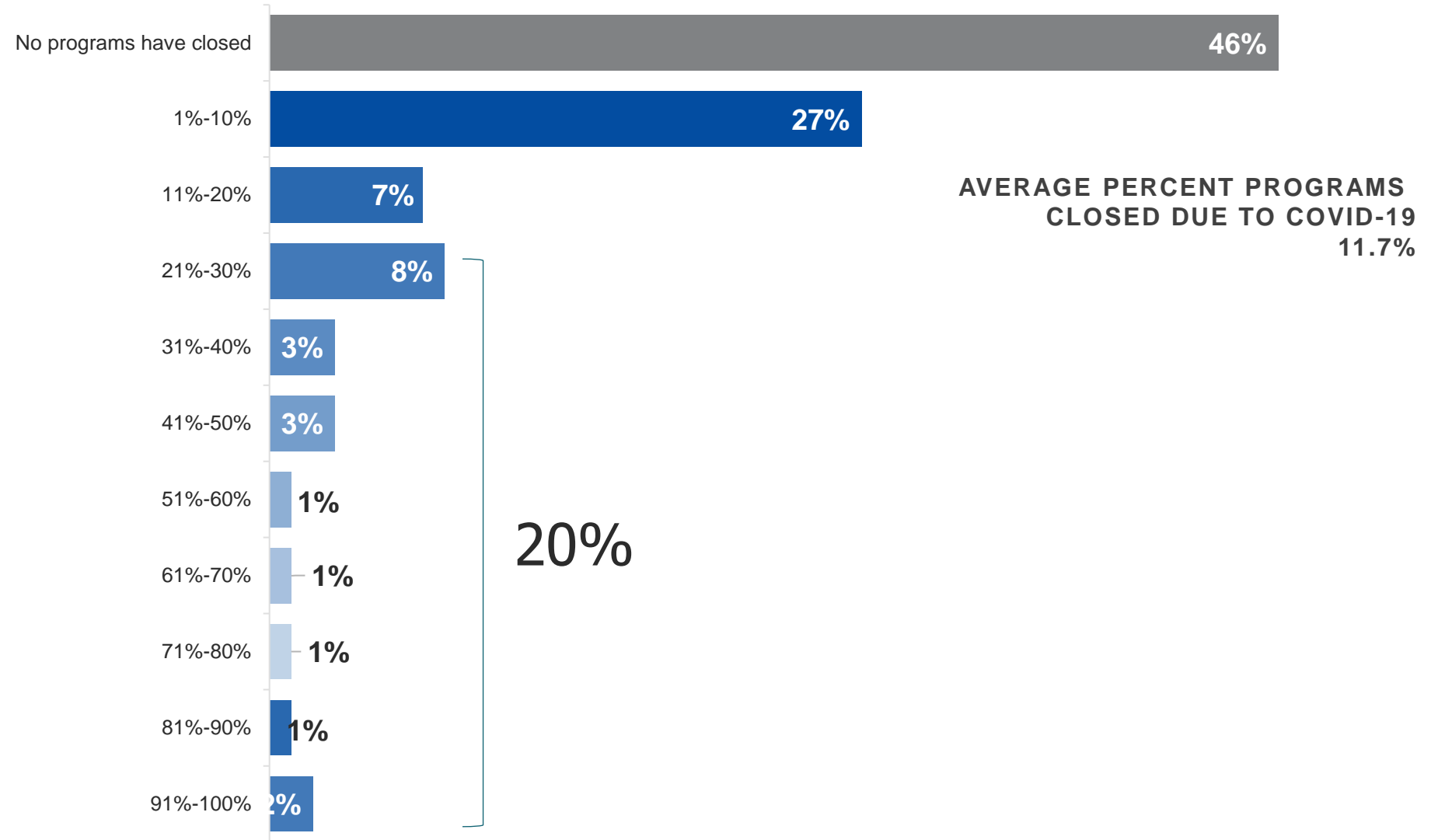
Demographic Information of Organization

Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

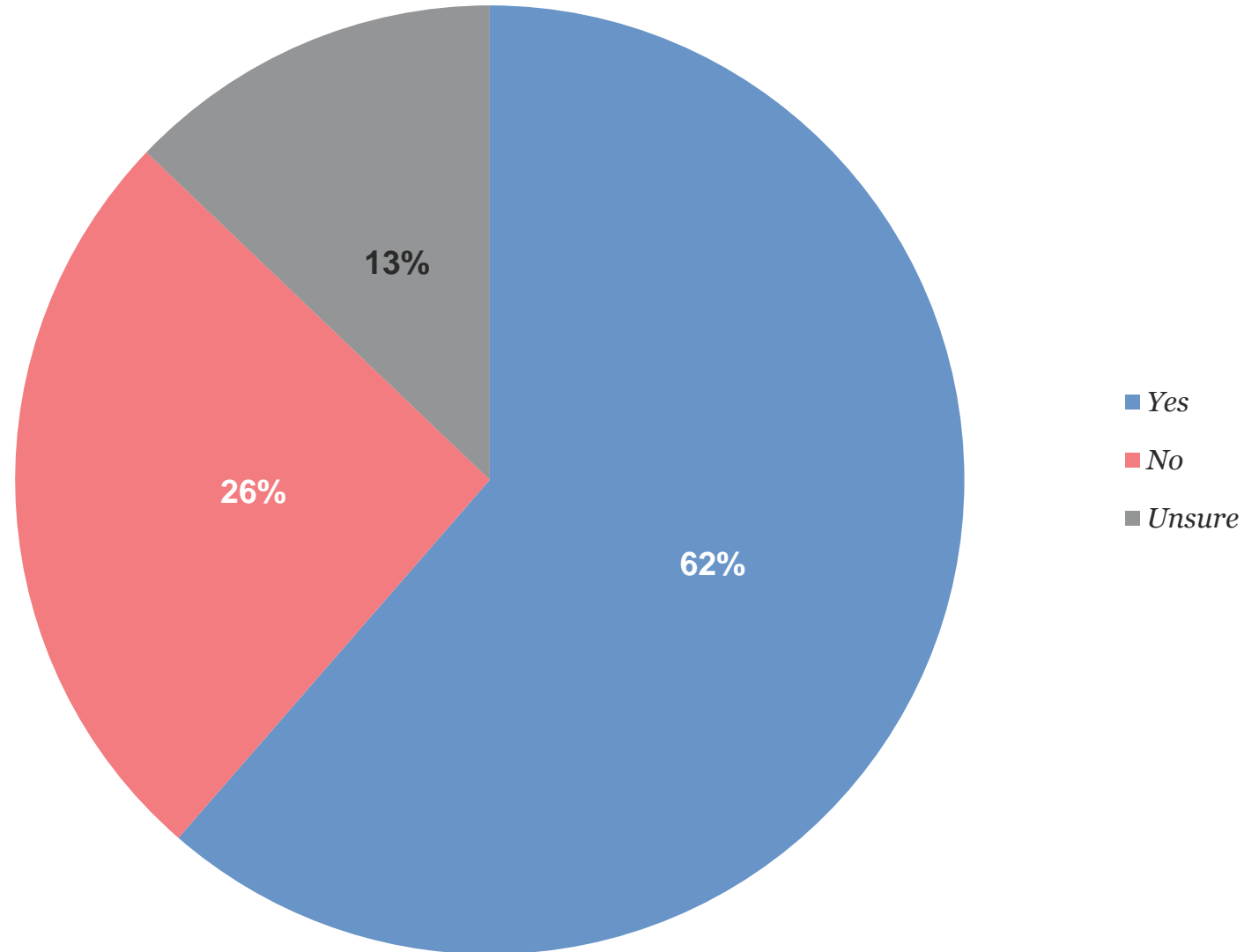
Half of organizations (54%) have closed some programs closed due to COVID-19, and a fifth have closed more than 20% of their programs.

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



A quarter of of organizations (26%) do not have enough personal protective equipment to last the next 2 months.

Do you have enough Personal Protective Equipment to last the next 2 months?



Impact of COVID-19 on Organizations

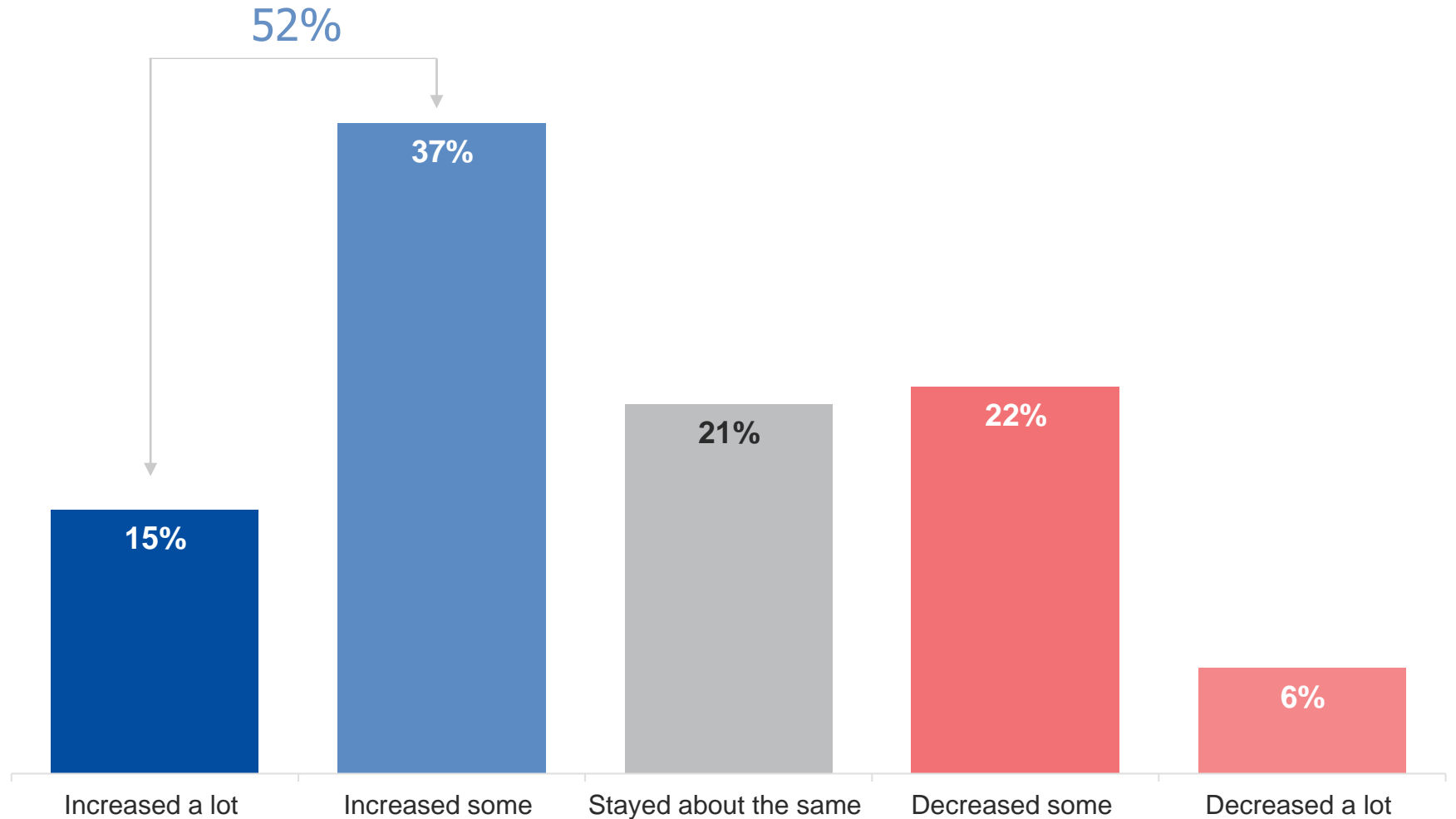
IMPACT ON PROGRAMS

Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

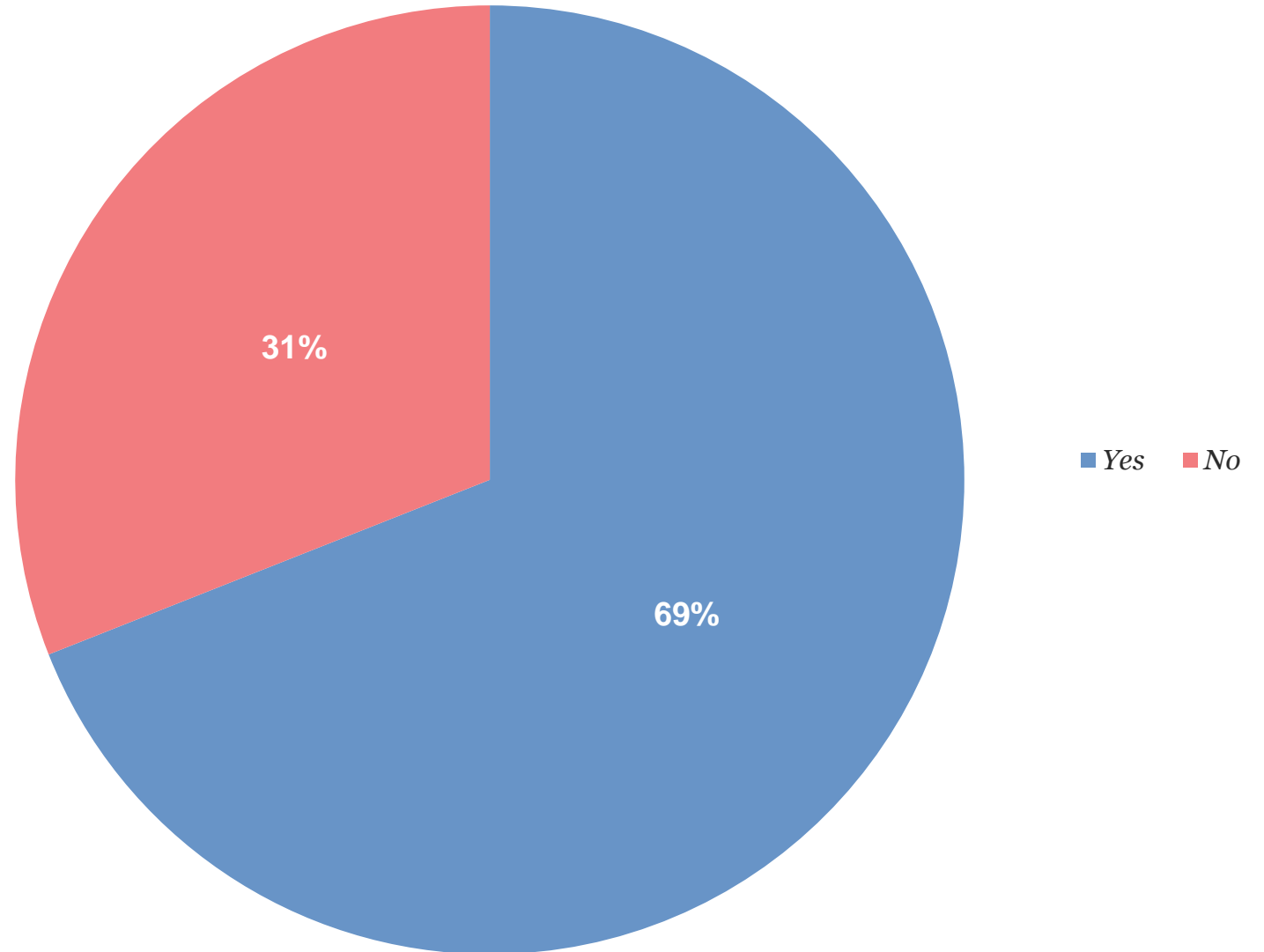
More than half of members (52%) report the demand for their organization's services has increased over the last three months.

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



Seven in ten members (69%) report their organization provides substance use disorder treatment.

Does your organization provide substance use disorder treatment?



Impact of COVID-19 on Organizations

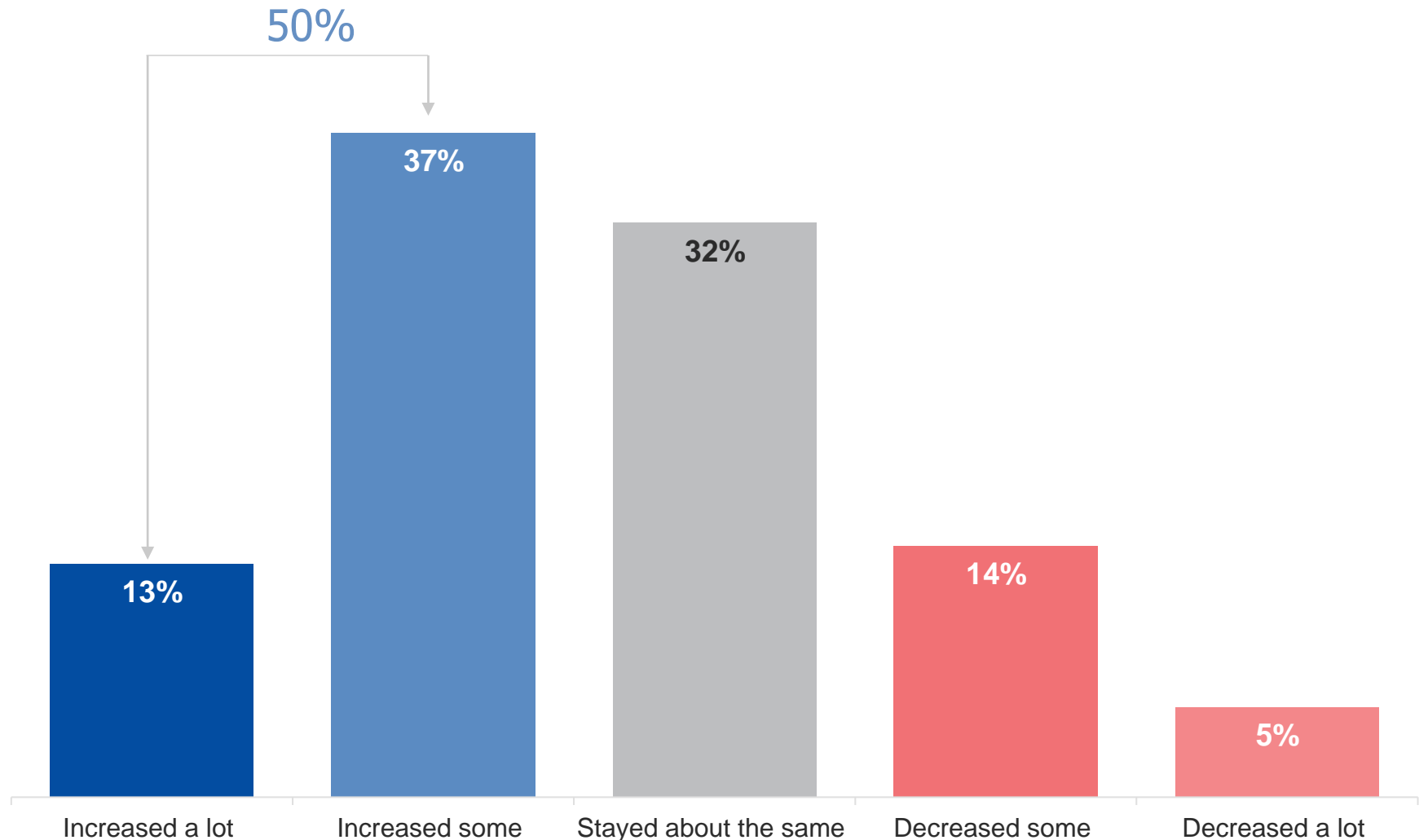
IMPACT ON PROGRAMS

Impact of COVID-19 on Organizations

IMPACT ON PROGRAMS

Of the members who report their organization offers substance use disorder services, half report (50%) the use of such services has increased in the past three months.

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

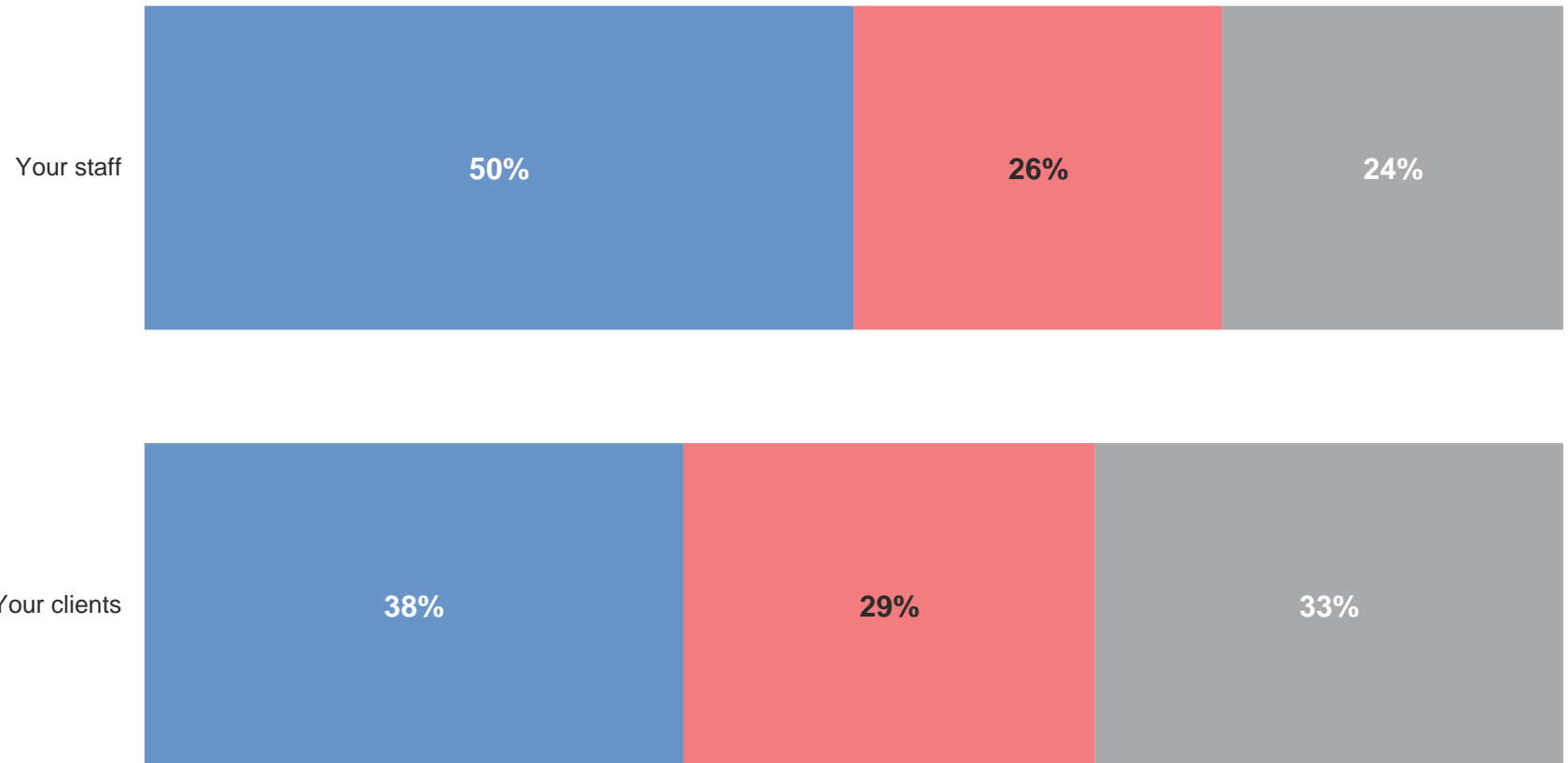


Among those whose organization offers substance use disorder services, n=237

Half of members report they can access COVID-19 tests for their staff, while 38% report they are able to do the same for their clients.

Are you able to access COVID-19 tests to meet the needs of your staff and clients?

■ Yes ■ No ■ Unsure/Not applicable

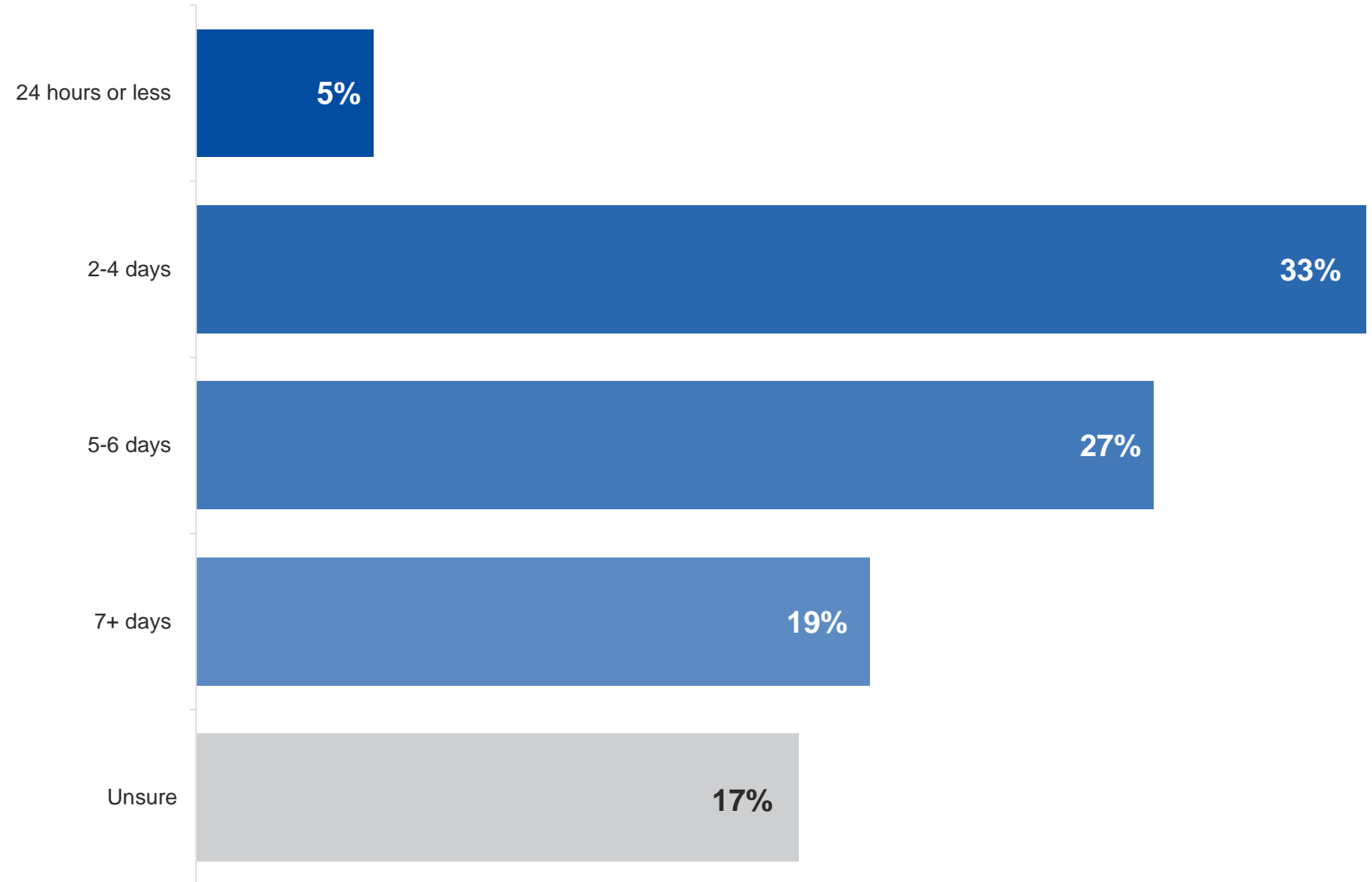


Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

A third report it takes their staff and clients anywhere from 2 to 4 days to receive results of their COVID-19 test, 27% report it takes between five and six days.

What is the average amount of time it has taken for your staff and clients to receive the results of their COVID-19 test?

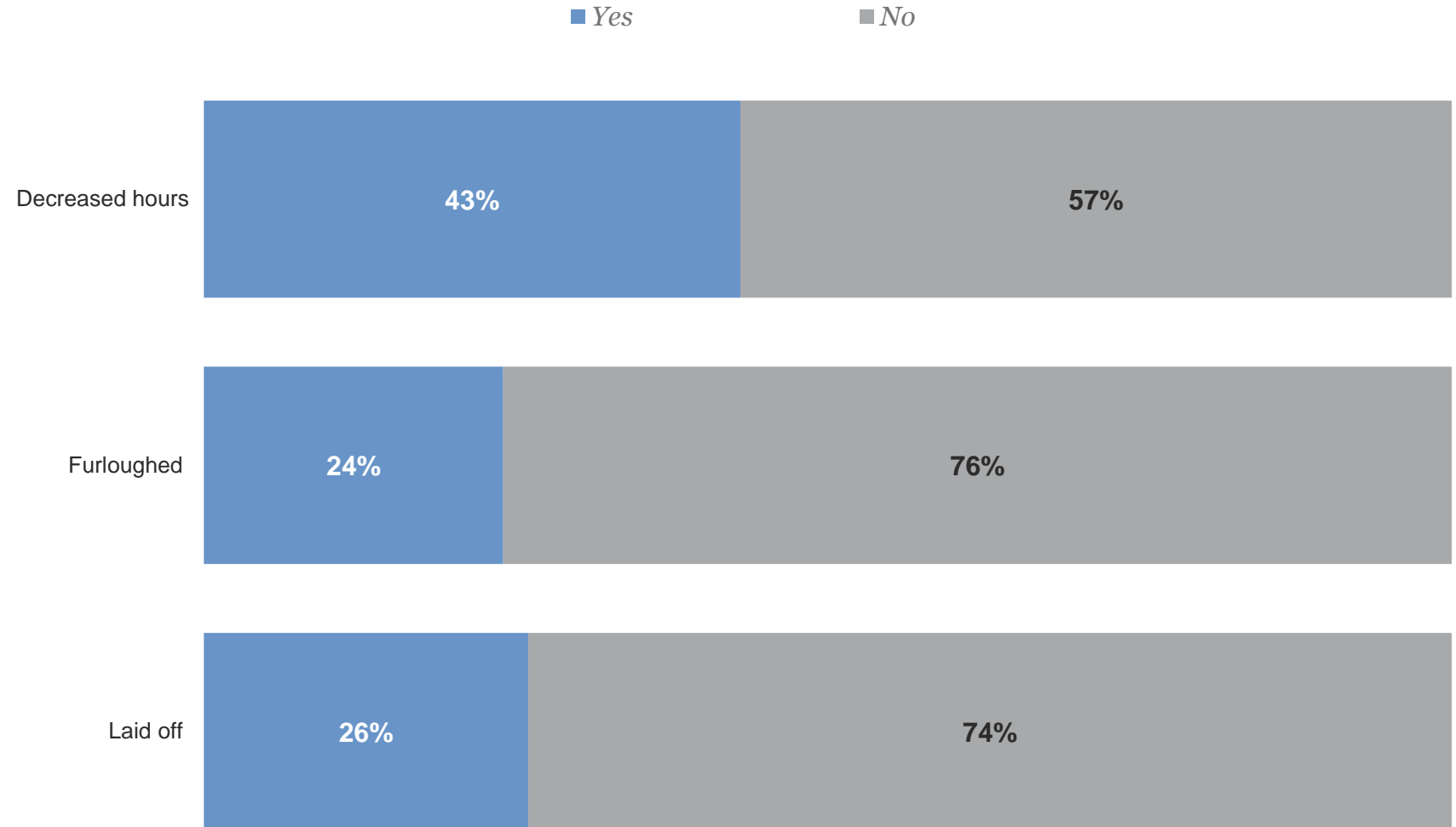


Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

A quarter (26%) of organizations have laid off employees, a quarter (24%) have furloughed employees, and 43% have decreased hours of employees a result of COVID-19.

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



Impact of COVID-19 on Organizations

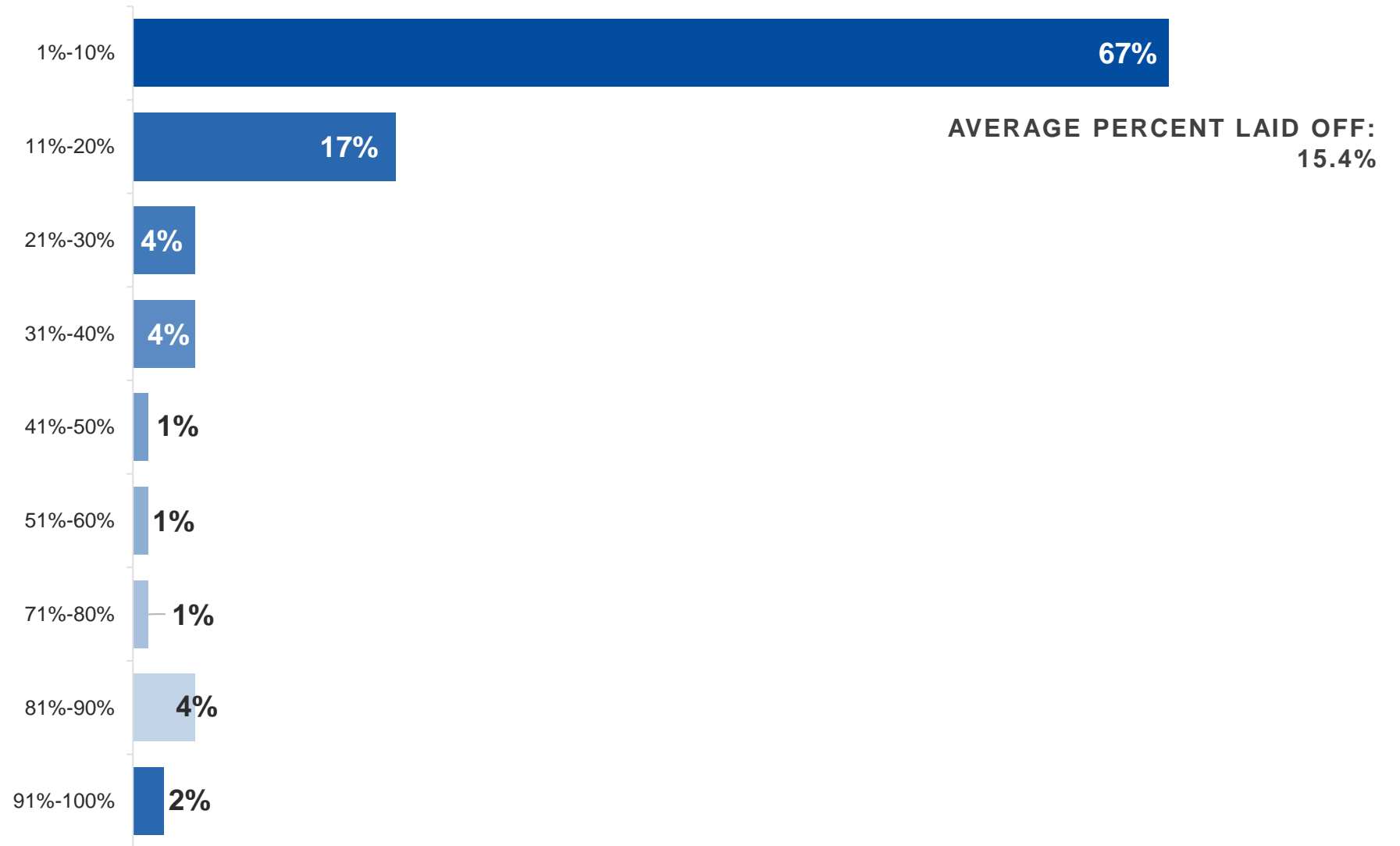
IMPACT ON WORKFORCE

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 15.4% of their workforce.

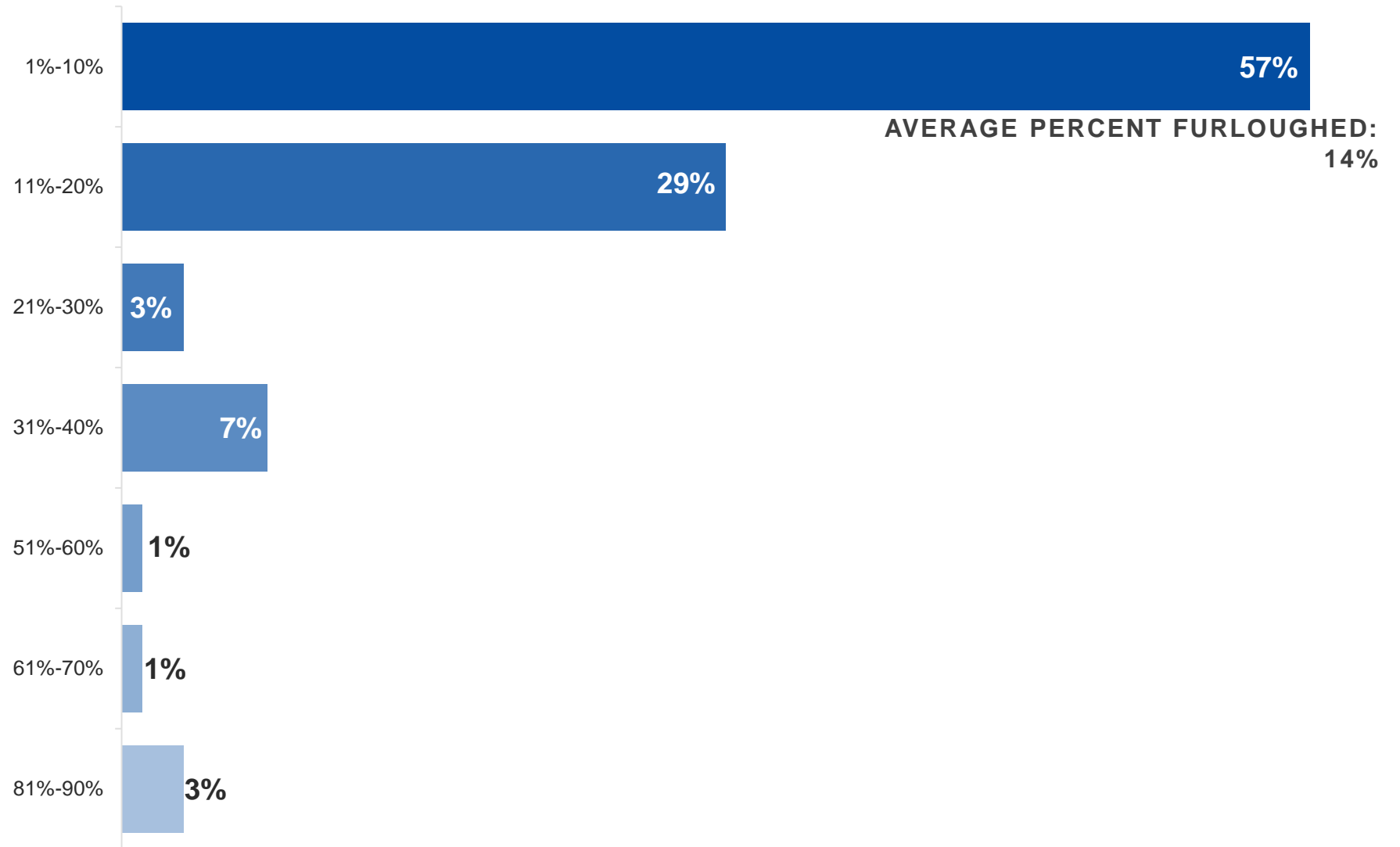
*About what percent of your work force have you **laid off** as a result of the COVID-19 outbreak?*



Among those who have laid off employees, n=84

Similarly, among those who have furloughed employees due to COVID-19, on average they have furloughed 14% 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

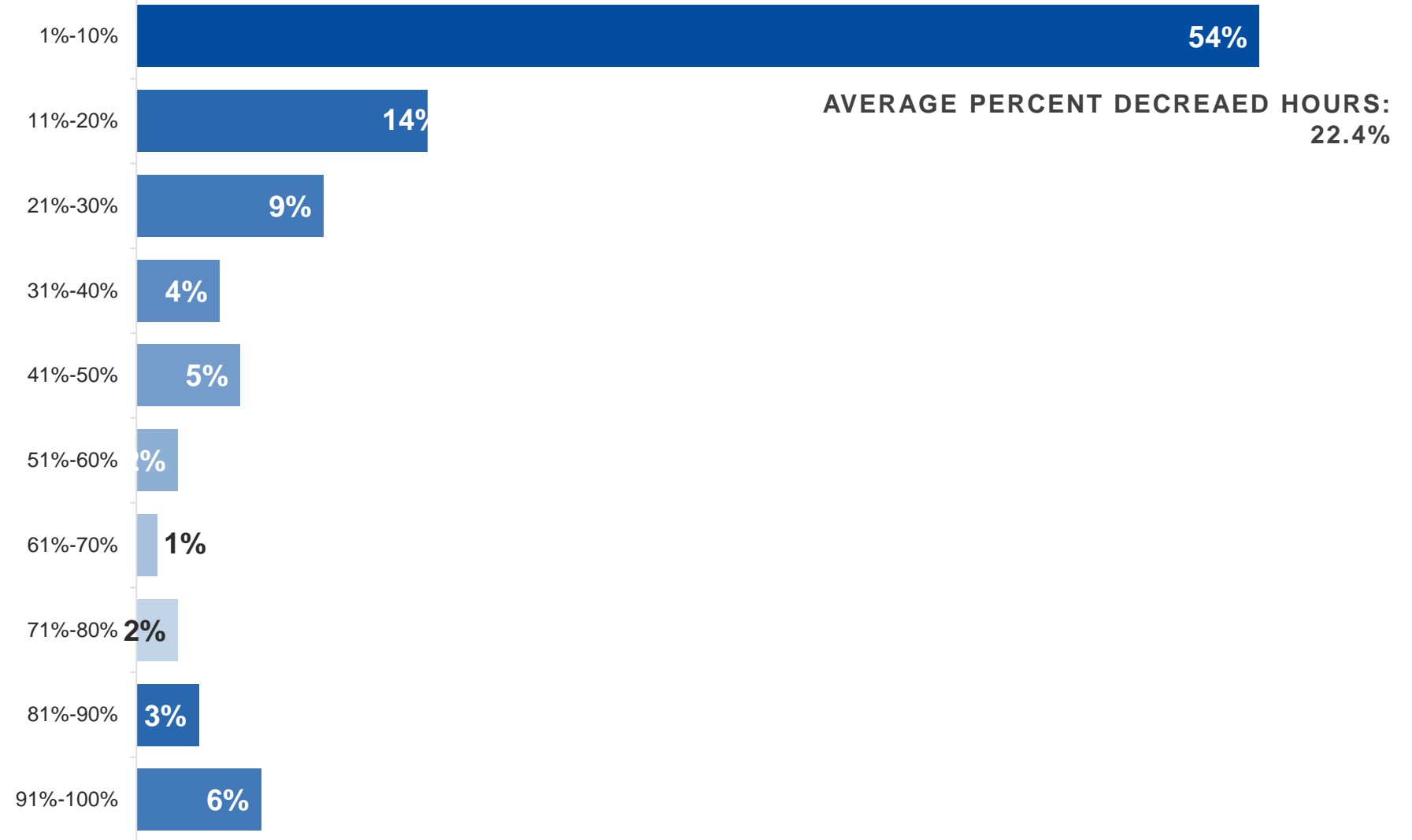
IMPACT ON WORKFORCE

Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

Organizations are more likely to decrease hours of a larger percent of their workers. Among organizations who have decreased hours of employees due to COVID-19, on average they have decreased hours of 22% of their workforce.

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



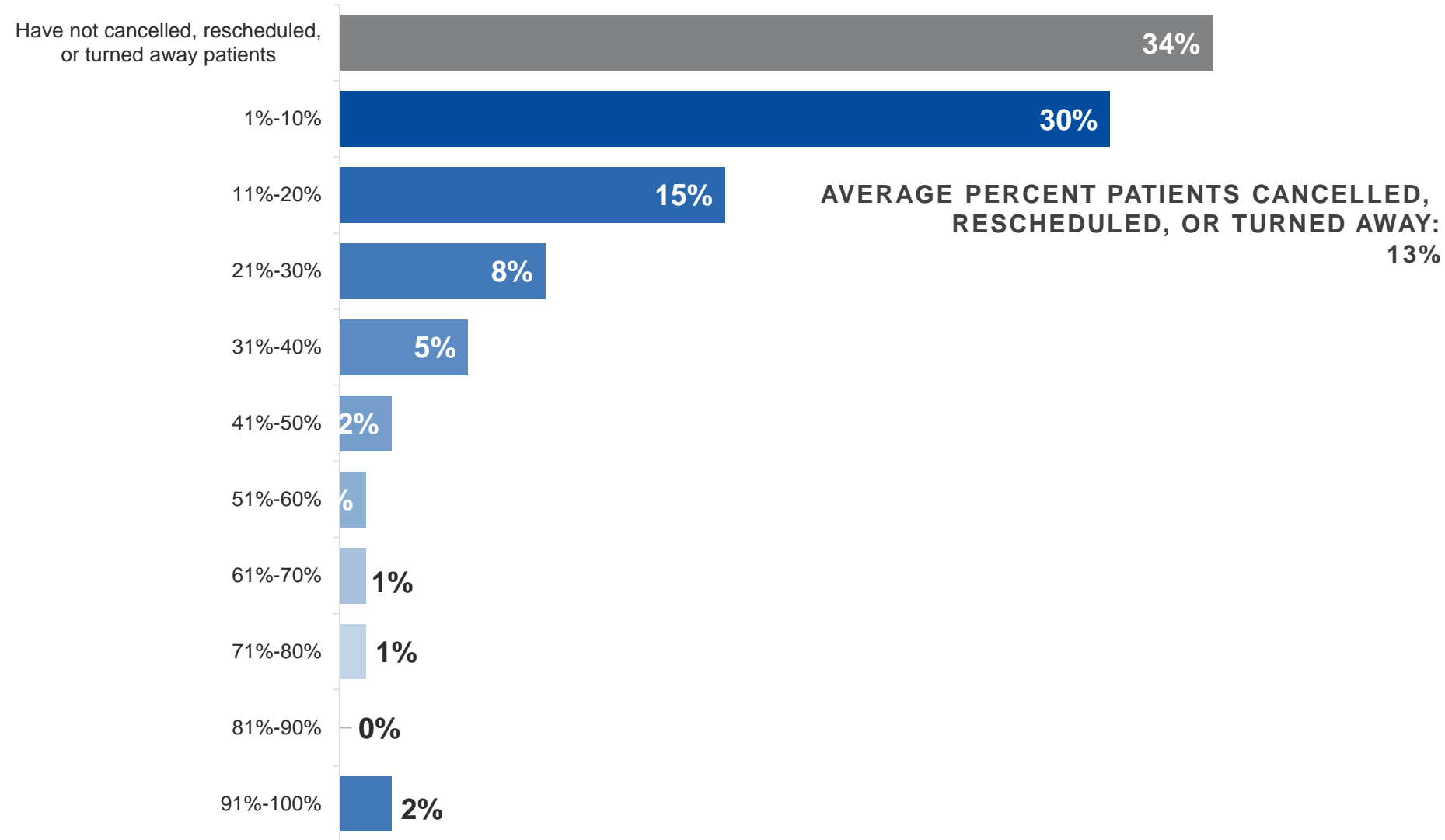
Among those who decreased hours of employees, n=137

Impact of COVID-19 on Organizations

IMPACT ON PATIENTS

65% 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?

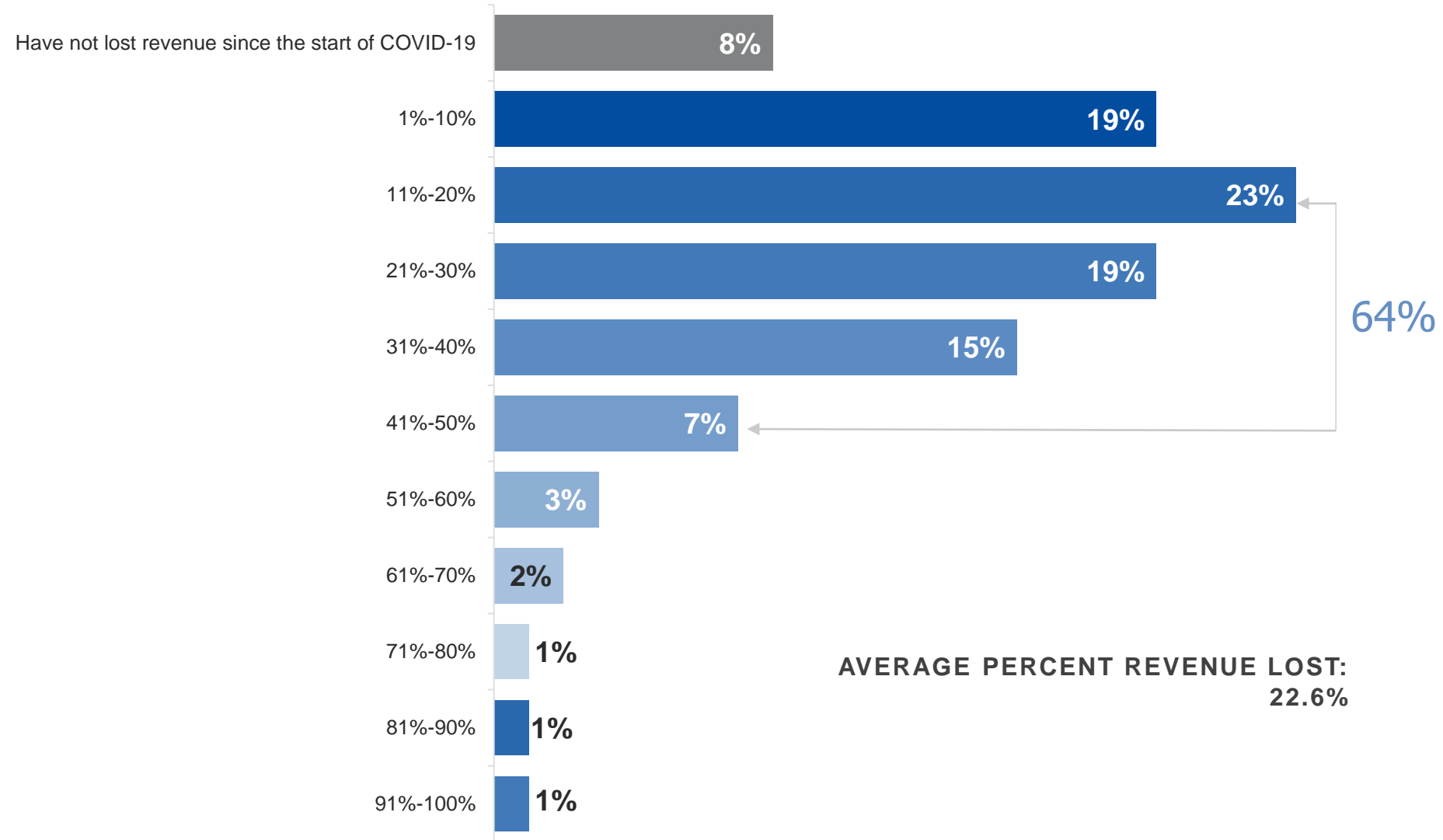


Impact of COVID-19 on Organizations

IMPACT ON FINANCES

On average, organizations have lost 22.6% 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, i.e. May, June and July? (As % of expected revenues for the three month period)

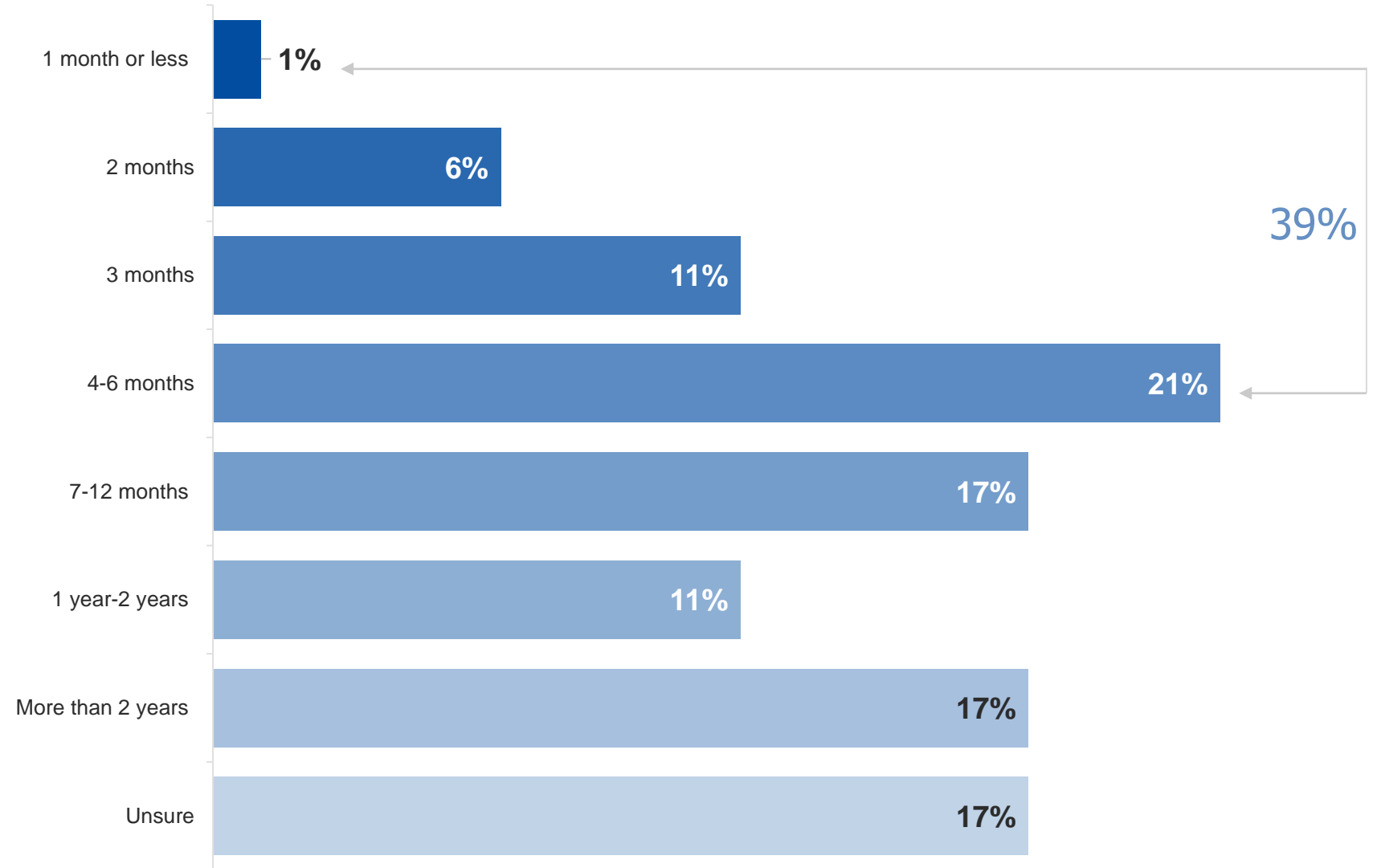


Impact of COVID-19 on Organizations

IMPACT ON FINANCES

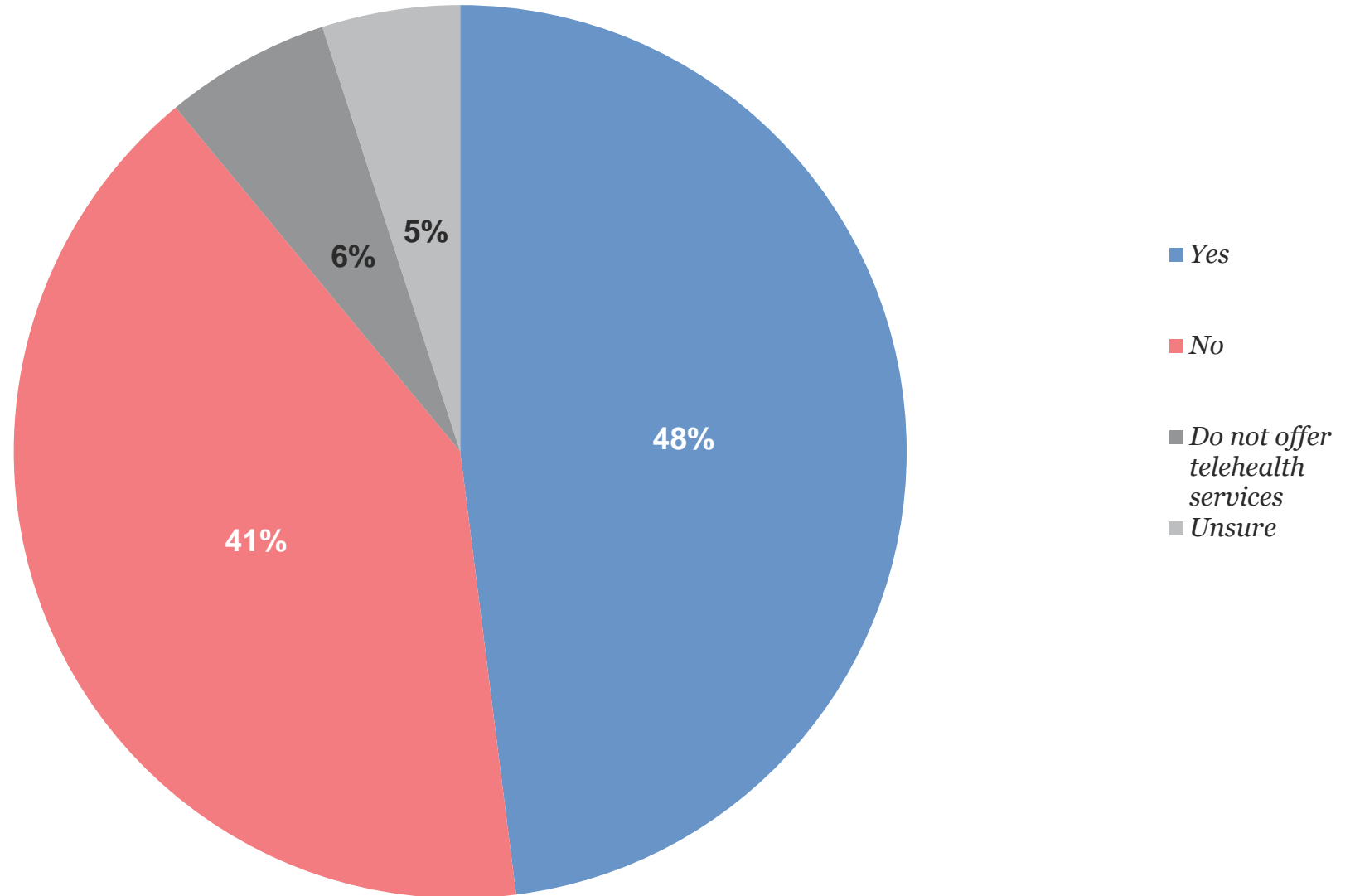
Thirty-nine percent of organizations think they can survive financially up to 6 months under the current situation.

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



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?



Impact of COVID-19 on Organizations

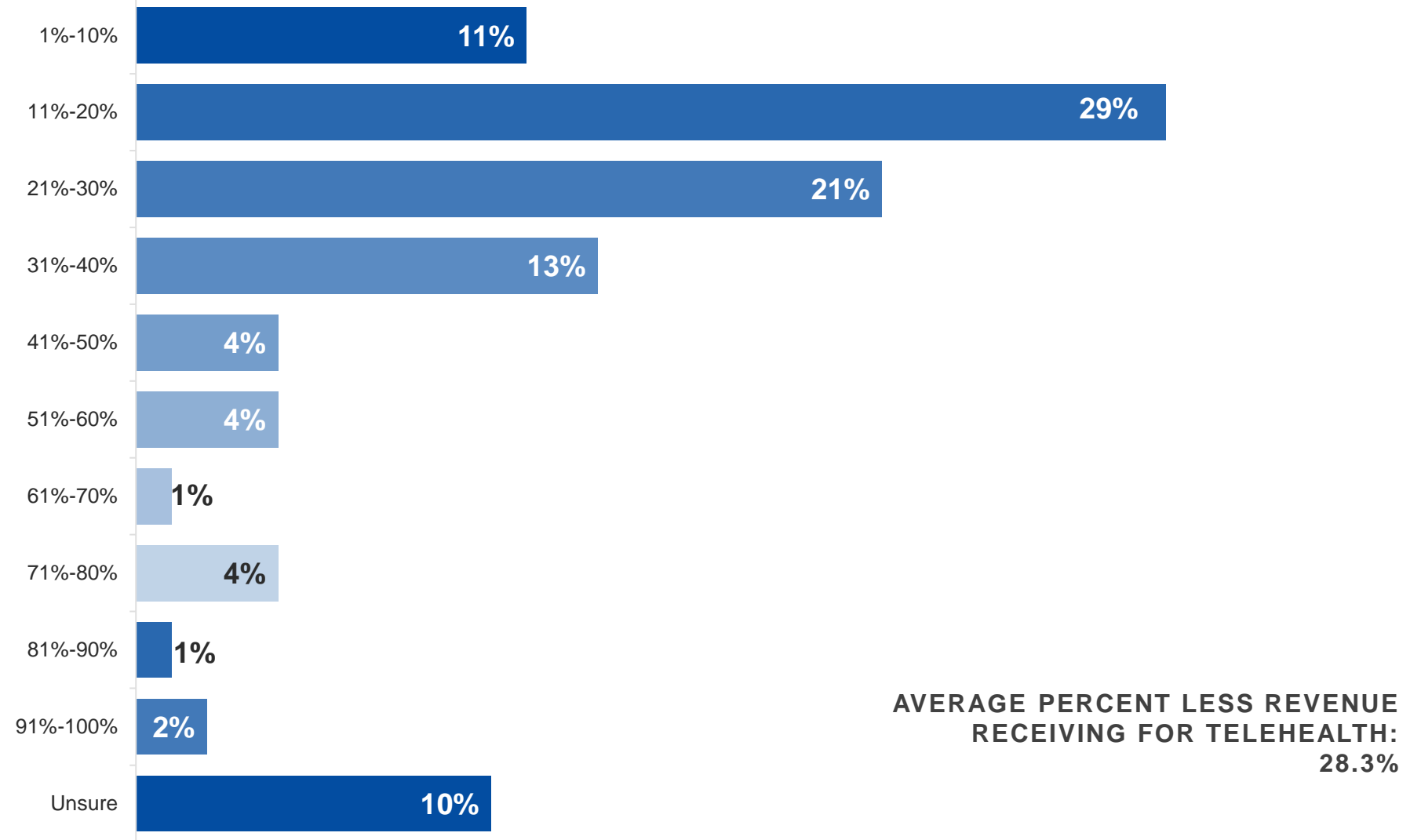
IMPACT ON FINANCES

Impact of COVID-19 on Organizations

IMPACT ON FINANCES

Among those who said telehealth services are *not* providing equal revenue to in-person services, on average they say they have received 28% less revenue.

Approximately how much less revenue are you receiving for telehealth services compared to revenue received from in-person services?



Among those who said telehealth services are not providing equal revenues in-person services, n=139

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Stimulus Funding

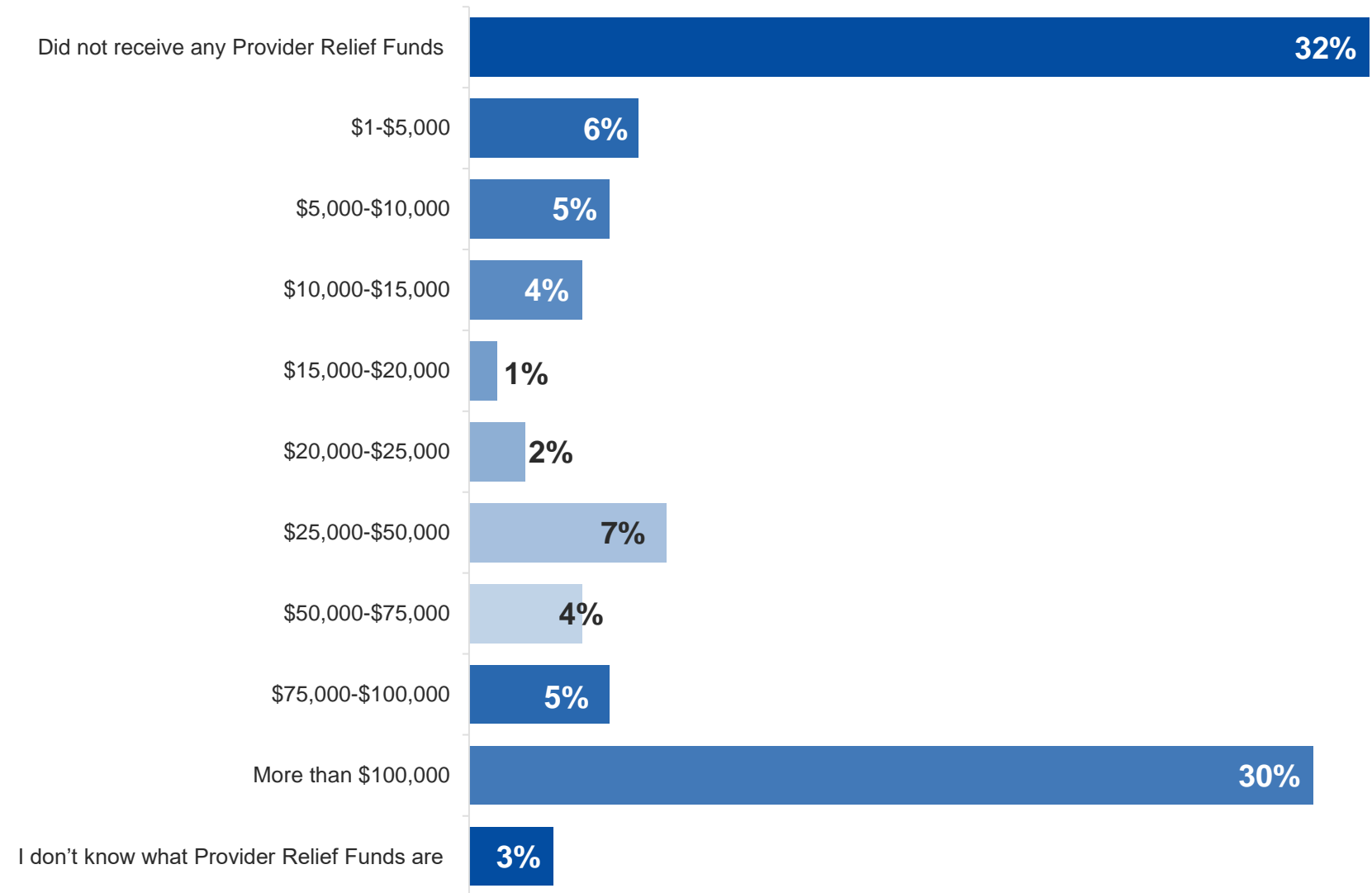


Demographic Information of Organization

Stimulus Funding

Nearly a third of organizations (32%) have not received any funding from the CARES Act, however, 30% report receiving over \$100,000 in funding.

Approximately how much total funding, if any, did your organization receive from the CARES Act (i.e. stimulus funding or Provider Relief Funds)?



Smaller organizations are more likely to say they did not receive any stimulus funding or Provider Relief Funds.

Approximately how much total funding, if any, did your organization receive from the CARES Act (i.e. stimulus funding or Provider Relief Funds)?

Among of Funding Received From CARES Act By Organizations Annual Operating Budget

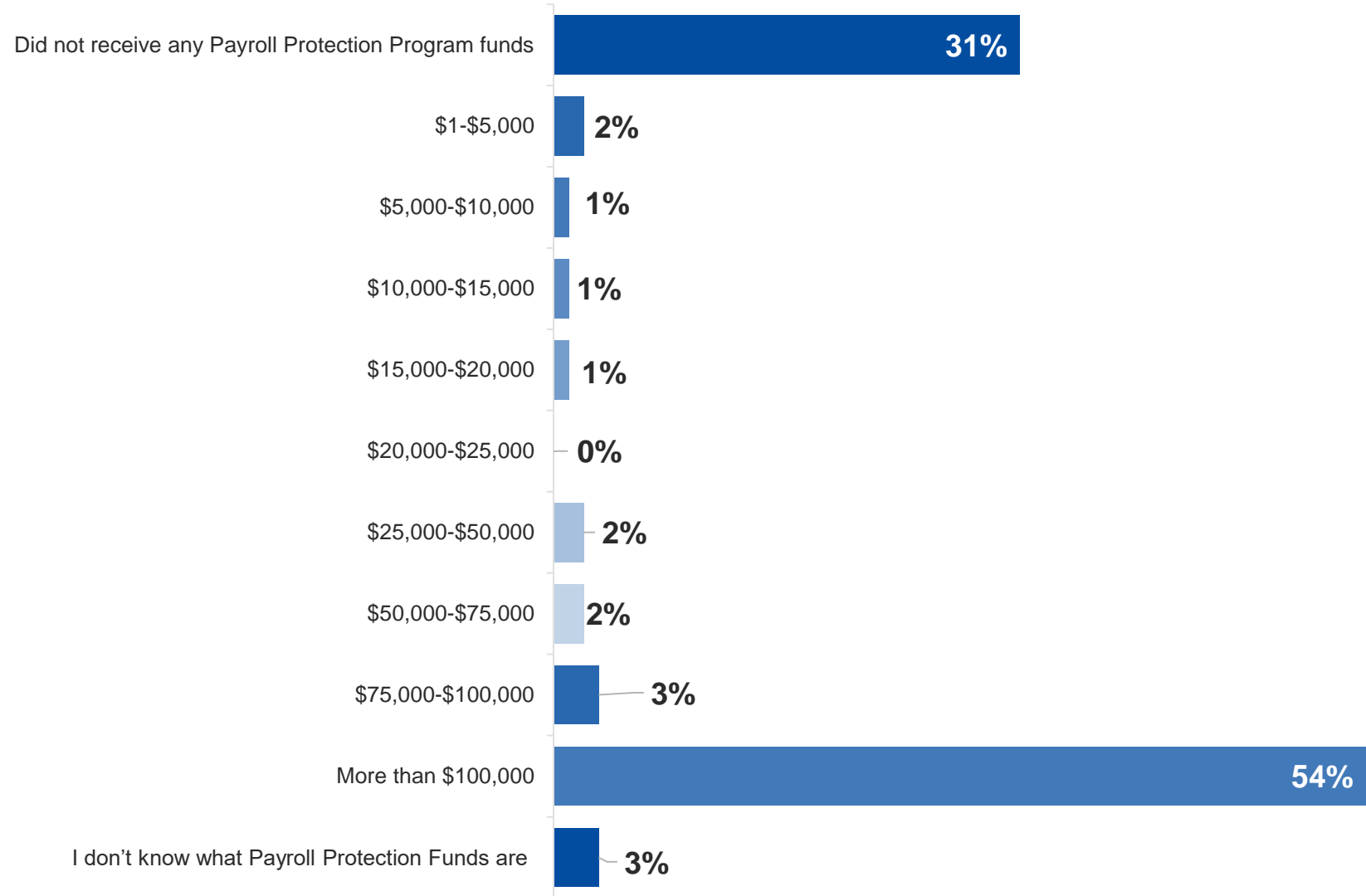
	<u>Annual Operating Budget Under \$5 Million (n=139)</u>	<u>Annual Operating Budget \$5-\$50 Million (n=166)</u>	<u>Annual Operating Budget Over \$50 Million (n=38)</u>
Did not receive any stimulus funding or Provider Relief Funds	52%	20%	11%
\$1-\$10,000	13%	11%	8%
\$10,000-\$20,000	6%	4%	10%
\$20,000-\$50,000	8%	10%	11%
\$50,000-\$100,000	7%	11%	3%
More than \$100,000	11%	41%	53%
I don't know what stimulus funding or Provider Relief Funds are	4%	2%	5%

Stimulus Funding

Stimulus Funding

Similarly, a third of organizations did not receive any funding from the Payroll Protection Program, although 54% received over \$100,000.

Approximately how much total funding, if any, did your organization receive from the Payroll Protection Program (PPP)?



77% of organizations with an annual operating budget between \$5-\$50 million received more than \$100,000 from the Payroll Protection Program.

Approximately how much total funding, if any, did your organization receive from the Payroll Protection Program (PPP)?

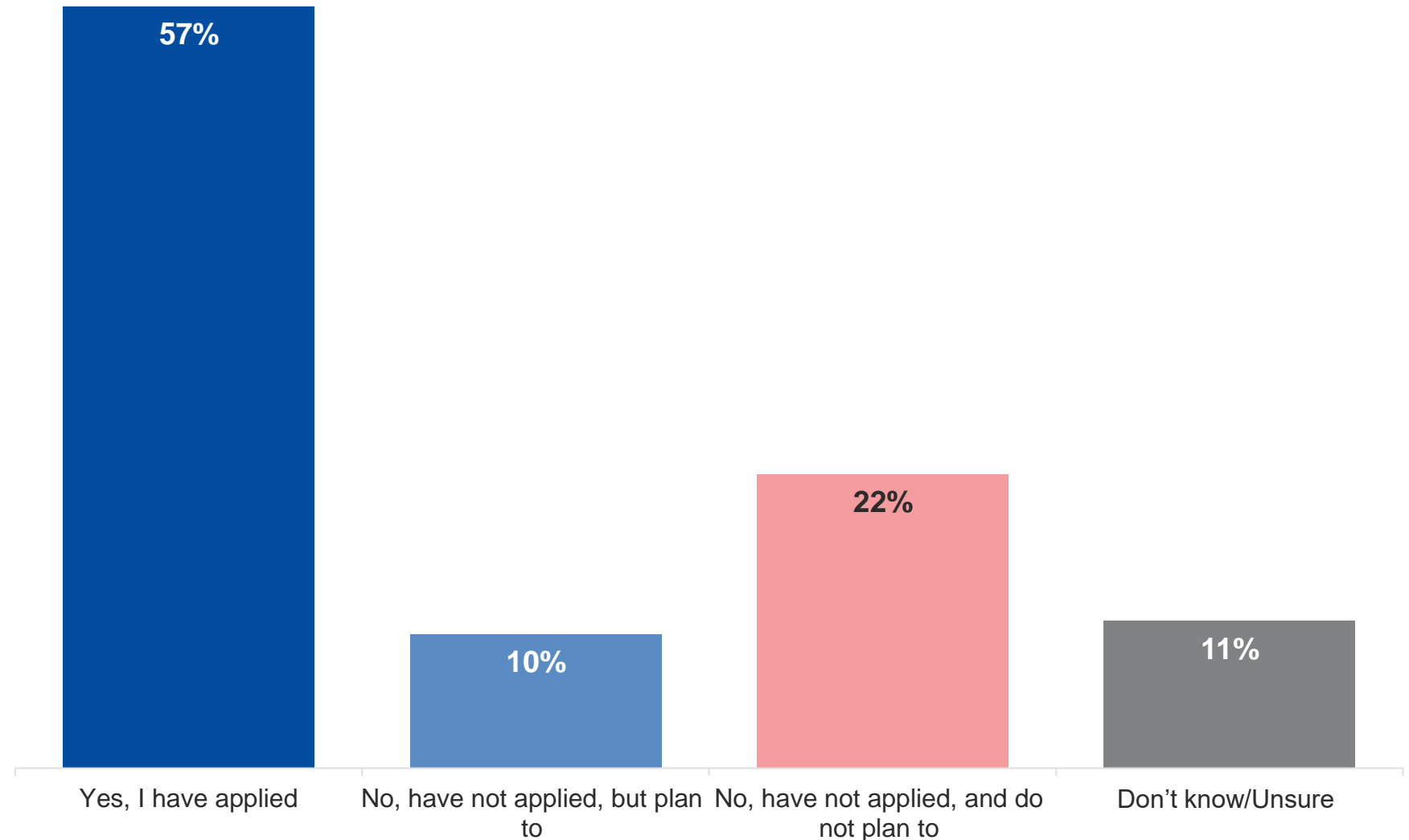
Among of PPP Funding Received By Organizations Annual Operating Budget

	<u>Annual Operating Budget Under \$5 Million (n=139)</u>	<u>Annual Operating Budget \$5-\$50 Million (n=166)</u>	<u>Annual Operating Budget Over \$50 Million (n=38)</u>
Did not receive any Payroll Protection Program funds	36%	19%	68%
\$1-\$10,000	6%	0%	6%
\$10,000-\$20,000	2%	0%	3%
\$20,000-\$50,000	6%	0%	0%
\$50,000-\$100,000	9%	3%	3%
More than \$100,000	37%	77%	18%
I don't know what Payroll Protection Funds are	4%	2%	3%

**Stimulus
Funding**

Nearly three in five organizations (57%) report they have applied on behalf of their organization for funding from the HHS Provider Relief Portal. And, 10% report they have not applied yet but intend to.

Did you, or do you plan to, apply on behalf of your organization for funding from the HHS Provider Relief Portal (Medicare and/or Medicaid/CHIP)?

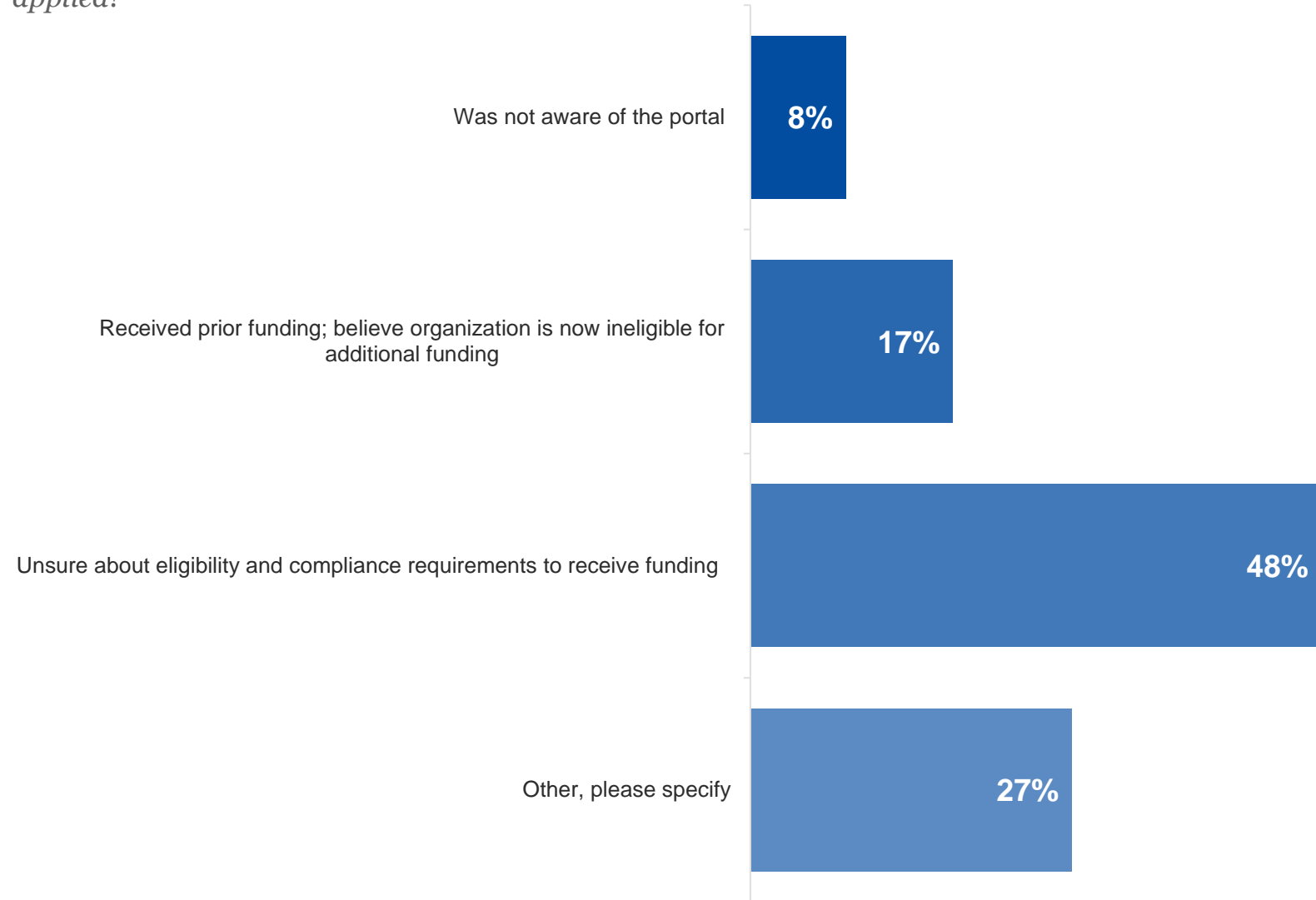


Stimulus Funding

Stimulus Funding

Among those who have no plans to apply to HHS Provider Relief, nearly half (48%) of organizations report they are unsure about their eligibility and compliance requirements to receive funding.

You indicated your organization has not applied for funding from the HHS Provider Relief Portal (Medicare and/or Medicaid/CHIP). Which of the following reasons best describes why your organization has not applied?



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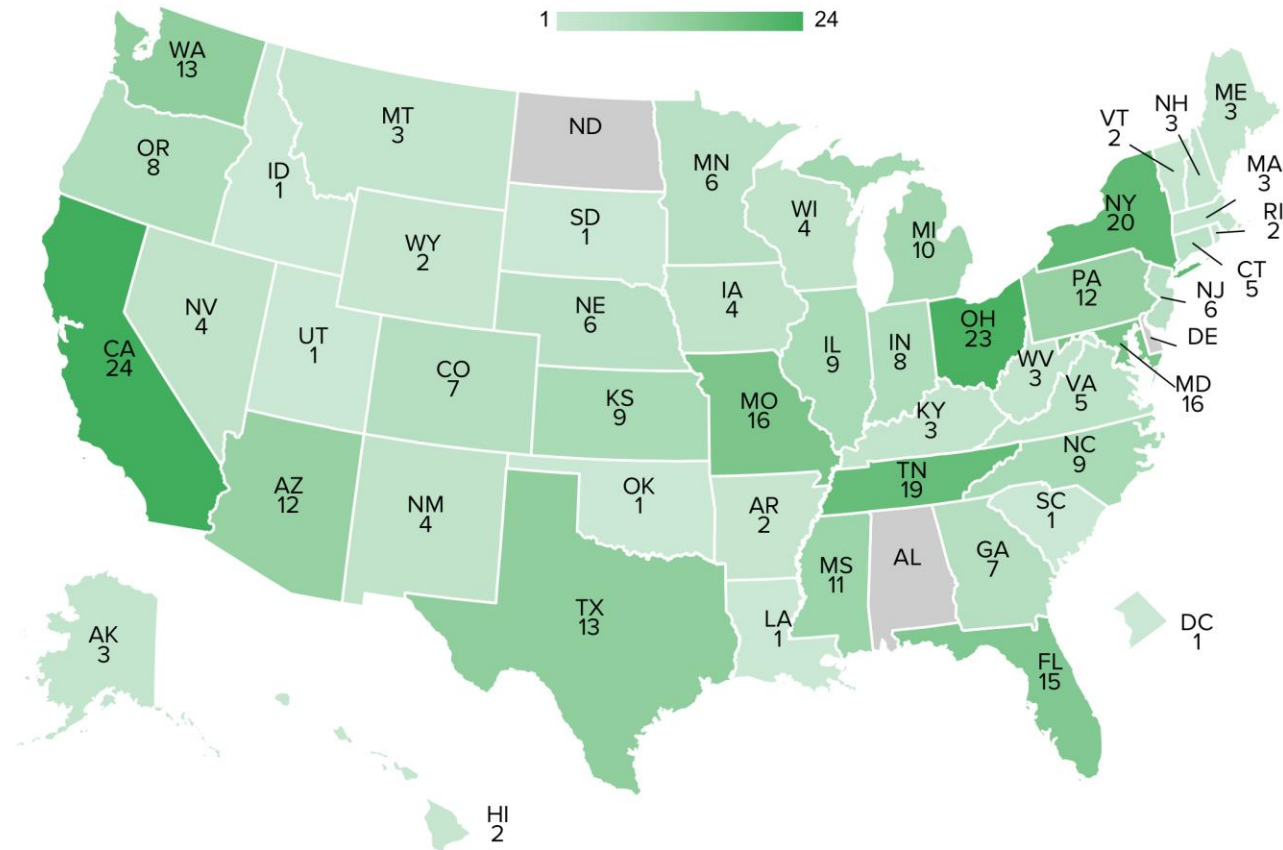
Stimulus Funding



Demographic Information of Organization

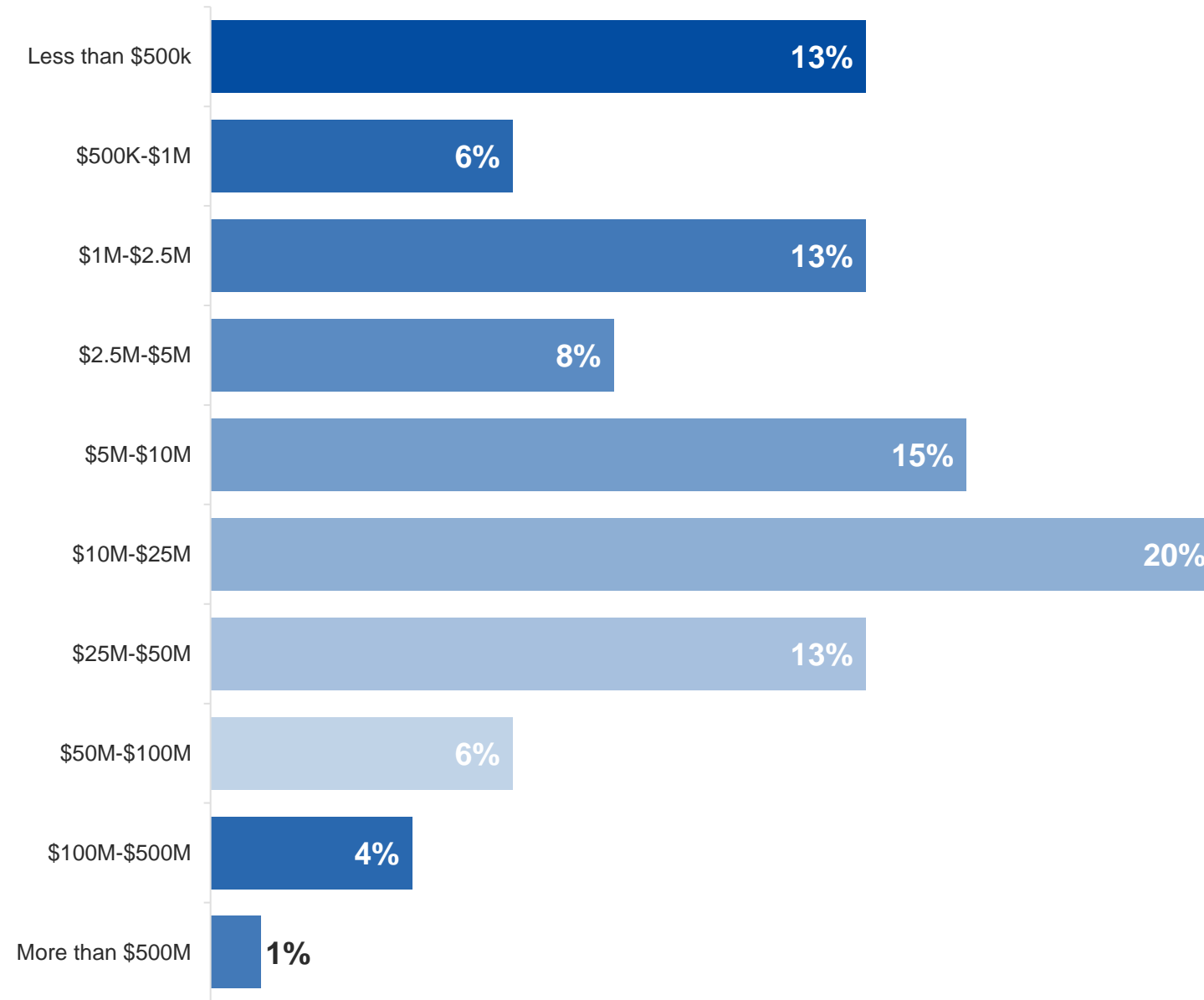
Demographic Information of Organization

NCBH Member Respondents By State, August 17, 2020 - September 1, 2020



Demographic Information of Organization

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



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