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%.
Impact of COVID-19 On Organization

1. Impact on programs, workforce, patients, and finances

2. Stimulus Funding

3. Demographic Information of Organization
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:

- No programs have closed: 55%
- 1%-10%: 30%
- 11%-20%: 8%
- 21%-30%: 5%
- 31%-40%
- 41%-50%
- 51%-60%
- 61%-70%
- 71%-80%
- 81%-90%
- 91%-100%

AVERAGE PERCENT PROGRAMS CLOSED DUE TO COVID-19
Feb. 2021: 5%
Aug. 2020: 11.7%
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?
Three in four members report their organization provides substance use disorder treatment.

*Does your organization provide substance use disorder treatment?*

- **Yes**: 75%
- **No**: 25%
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?

- Increased a lot: 19% (6% increase)
- Increased some: 44% (7% increase)
- Stayed about the same: 26% (6% decrease)
- Decreased some: 9% (5% decrease)
- Decreased a lot: 2% (3% decrease)

Among those whose organization offers substance use disorder services, n=247.
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?
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
A quarter (27%) of organizations have laid off employees, a quarter (23%) have furloughed employees, and 35% have decreased hours of employees as 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?

- **Laid off**: 27% Yes, 73% No
- **Furloughed**: 23% Yes, 77% No
- **Decreased hours**: 35% Yes, 65% No

Change in % yes from Aug. 2020:
- Laid off: -8%
- Furloughed: -1%
- Decreased hours: -1%
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 workforce have you laid off as a result of the COVID-19 outbreak?

- 1%-10%: 76%
- 11%-20%: 14%
- 21%-30%: 7%
- 31%-40%: 2%
- 41%-50%: 0%
- 51%-60%: 1%
- 61%-70%: 0%
- 71%-80%: 0%
- 81%-90%: 0%
- 91%-100%: 0%

AVERAGE PERCENT LAID OFF:
Feb 2021: 9.1%
Aug 2020: 15.4%
Similarly, among those who have furloughed employees due to COVID-19, on average they have furloughed 9.4% of their workforce.

AVERAGE PERCENT FURLOUGHED:
- Feb. 2021: 9.4%
- Aug. 2020: 14%

Impact of COVID-19 on Organizations

IMPACT ON WORKFORCE

Among those who have furloughed employees, n=76
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 WORKFORCE

AVERAGE PERCENT DECREASE HOURS:
Feb. 2021: 9.5%
Aug. 2020: 22.4%
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?

<table>
<thead>
<tr>
<th>Percentage of Patients Cancelled, Rescheduled, or Turned Away</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have not cancelled, rescheduled, or turned away patients</td>
<td>32%</td>
</tr>
<tr>
<td>1%-10%</td>
<td>38%</td>
</tr>
<tr>
<td>11%-20%</td>
<td>19%</td>
</tr>
<tr>
<td>21%-30%</td>
<td>7%</td>
</tr>
<tr>
<td>31%-40%</td>
<td>2%</td>
</tr>
<tr>
<td>41%-50%</td>
<td>1%</td>
</tr>
<tr>
<td>51%-60%</td>
<td>1%</td>
</tr>
<tr>
<td>61%-70%</td>
<td>0%</td>
</tr>
<tr>
<td>71%-80%</td>
<td>0%</td>
</tr>
<tr>
<td>81%-90%</td>
<td>0%</td>
</tr>
<tr>
<td>91%-100%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Average percentage patients cancelled, rescheduled, or turned away:

- Feb. 2021: 8.2%
- Aug. 2020: 13%
Nearly half (45%) of organizations surveyed say their patient waitlist has grown in the past 3 months.

Impact of COVID-19 on Organizations

IMPACT ON PATIENTS

AVERAGE PERCENT WAITLIST GROWTH: 7.2%

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

- No: 55%
- Yes, grown by 1%-10%: 21%
- Yes, grown by 11%-20%: 13%
- Yes, grown by 21%-30%: 5%
- Yes, grown by 31%-40%: 2%
- Yes, grown by 41%-50%: 1%
- Yes, grown by 51%-60%: 1%
- Yes, grown by 61%-70%: 1%
- Yes, grown by 71%-80%: 0%
- Yes, grown by 81%-90%: 0%
- Yes, grown by 91%-100%: 1%
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)

Have not lost revenue since the start of COVID-19

- 14%

- 1%-10%: 27%
- 11%-20%: 30%
- 21%-30%: 18%
- 31%-40%: 6%
- 41%-50%: 2%
- 51%-60%: 3%
- 61%-70%: 0%
- 71%-80%: 0%
- 81%-90%: 0%
- 91%-100%: 0%

Average Percent Revenue Lost:
- Feb. 2021: 15.1%
- Aug. 2020: 22.6%
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

- 1 month or less: 1% (2020) vs. 1% (2021)
- 2 months: 6% (2020) vs. 5% (2021)
- 3 months: 6% (2020) vs. 11% (2021)
- 4-6 months: 16% (2020) vs. 21% (2021)
- 7-12 months: 12% (2020) vs. 17% (2021)
- 1 year-2 years: 11% (2020) vs. 17% (2021)
- More than 2 years: 17% (2020) vs. 32% (2021)
- Unsure: 11% (2020) vs. 17% (2021)
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?

- Yes: 50%
- No: 45%
- Do not offer telehealth services: 4%
- Unsure: 2%
Impact of COVID-19 On Organization

1. Impact on programs, workforce, patients, and finances

2. Stimulus Funding

3. Demographic Information of Organization
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?

- Did not receive any Payroll Protection Program funds/Provider Relief Fund: 14%
- $1-$4,999: 1%
- $5,000-$9,999: 1%
- $10,000-$14,999: 2%
- $15,000-$19,999: 1%
- $20,000-$24,999: 0%
- $25,000-$49,999: 1%
- $50,000-$74,999: 3%
- $75,000-$99,999: 1%
- More than $100,000: 77%

I don't know what Payroll Protection Funds are/Provider Relief Fund
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?

<table>
<thead>
<tr>
<th>Did not receive any Payroll Protection Program funds</th>
<th>Annual Operating Budget Under $5 Million (n=71)</th>
<th>Annual Operating Budget $5-$50 Million (n=241)</th>
<th>Annual Operating Budget Over $50 Million (n=20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1-$9,999</td>
<td>2%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>$10,000-$19,999</td>
<td>3%</td>
<td>1%</td>
<td>10%</td>
</tr>
<tr>
<td>$20,000-$49,999</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>$50,000-$99,999</td>
<td>11%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>More than $100,000</td>
<td>69%</td>
<td>80%</td>
<td>65%</td>
</tr>
<tr>
<td>I don’t know what Payroll Protection Funds are</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>
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?

- Yes: 87%
- No: 13%
- Don't know: 1%

Among those who received federal funding, n=284
Contents

1. Impact of COVID-19 On Organization
   - Impact on programs, workforce, patients, and finances

2. Stimulus Funding

3. Demographic Information of Organization
What is the size of your organization’s annual operating budget?

- Less than $500k: 2%
- $500K-$1M: 3%
- $1M-$2.5M: 8%
- $2.5M-$5M: 9%
- $5M-$10M: 16%
- $10M-$25M: 24%
- $25M-$50M: 17%
- $50M-$100M: 15%
- $100M-$500M: 5%
- More than $500M: 1%