

IMPACT & OUTLOOK SURVEY

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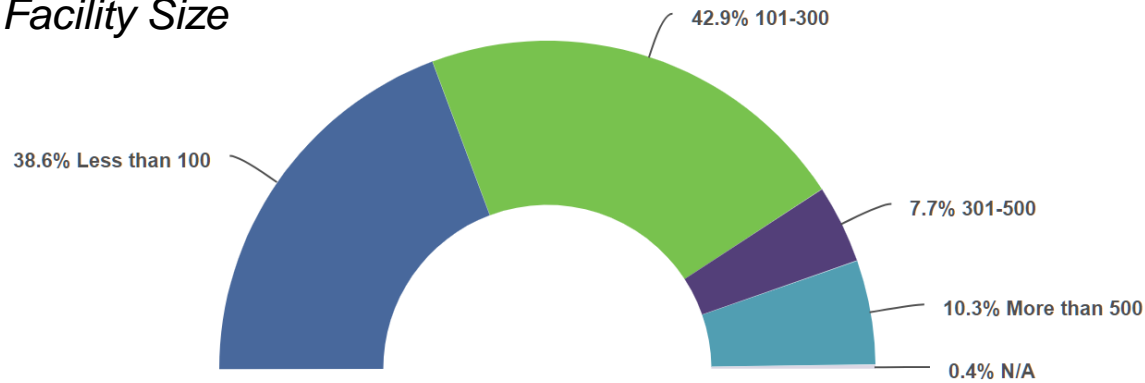
As a part of RehabCare's dedication to hope, healing and recovery, we have engaged Butler Street Consulting to execute this Impact & Outlook survey to capture the impact of the COVID-19 crisis on facility settings including SNFs, ALs/ILs, Life Plan Communities and Outpatient Facilities. All survey responses were from CEOs, Administrators, CFOs, CNOs, and other senior clinical executives.

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Survey Respondents

Facility Size



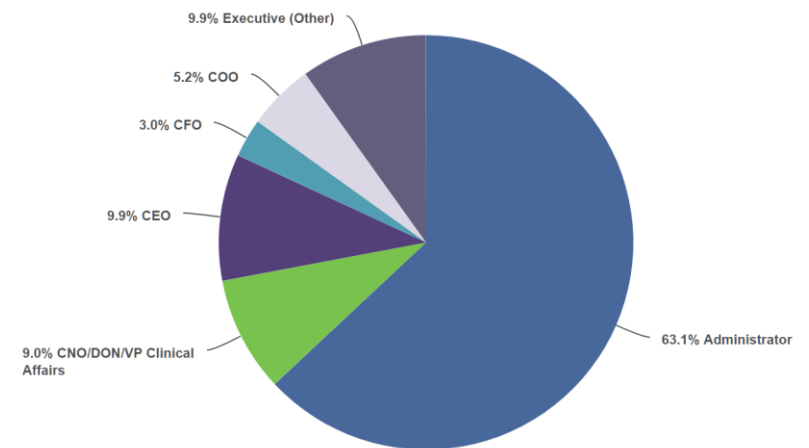
233 survey responses representing 215 distinct healthcare facilities were gathered from senior leaders and administrators in June of 2020.

A majority of the respondents represent Skilled Nursing Facilities (87.6%), Assisted/Independent Living (AL/IL) facilities (29.5%) and Retirement Communities (24.4%).

Facility Type(s)

Value	Percent
Skilled Nursing Facility (SNF)	87.6%
Assisted/Independent Living (AL/IL)	29.5%
Retirement Community (CCRC)	24.4%
Transitional Care Unit (TCU)	3.0%
Hospital System	2.6%
N/A	0.9%

Role

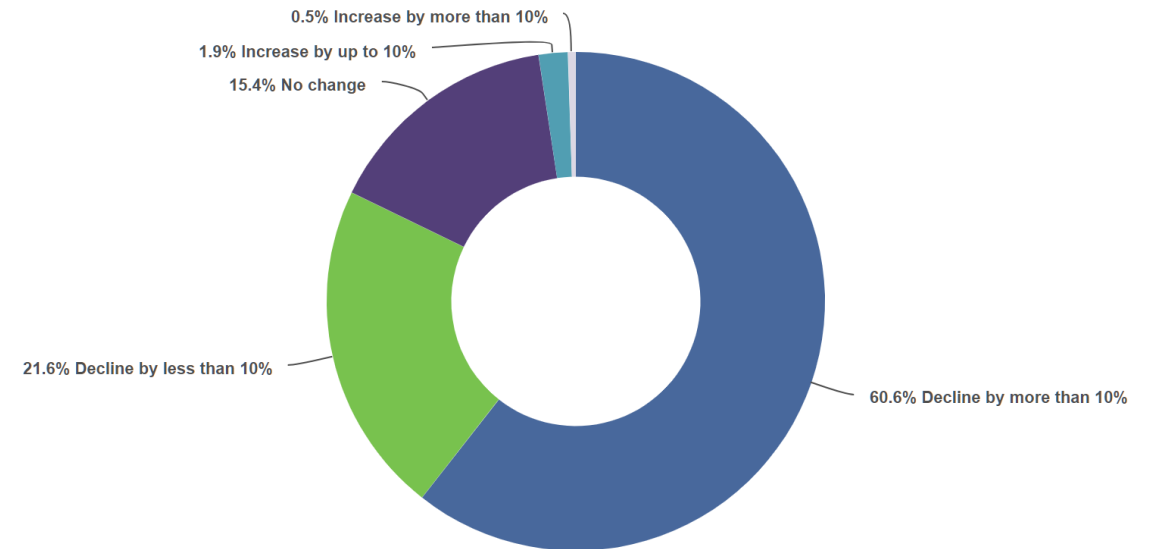
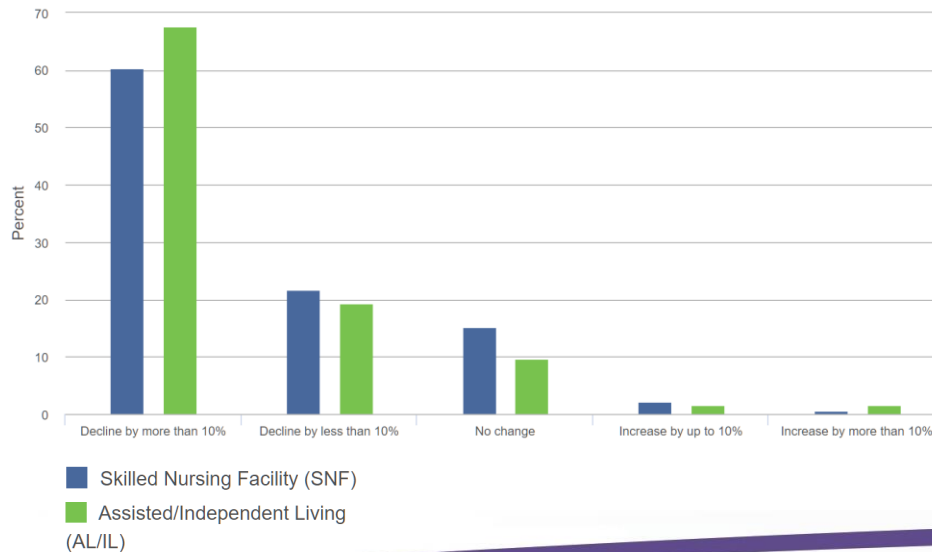


Crisis Impact to Occupancy

How has the COVID-19 pandemic impacted your occupancy?

Overall, nearly 61% of respondents have experienced a **Decline by more than 10%** in their occupancy rates.

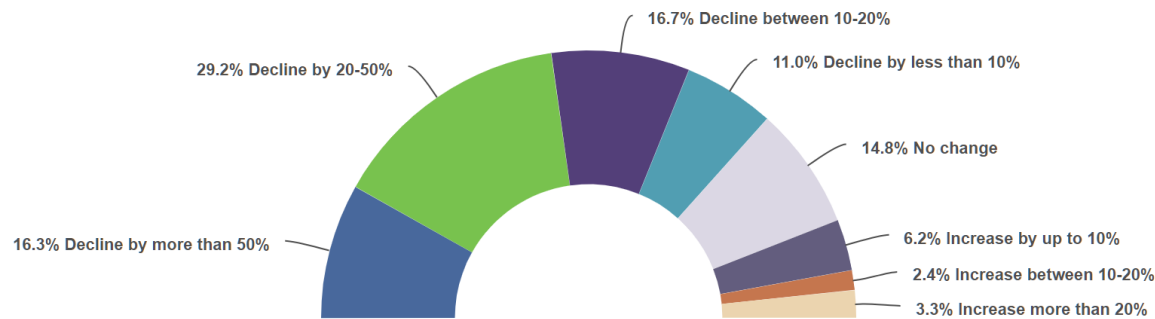
When segmenting and comparing by facility type, Assisted/Independent Living (AL/IL) facilities experienced the greatest impact to occupancy levels.



Value	Percent
Decline by more than 10%	60.6%
Decline by less than 10%	21.6%
No change	15.4%
Increase by up to 10%	1.9%
Increase by more than 10%	0.5%

Crisis Impact to PART A Monthly Census

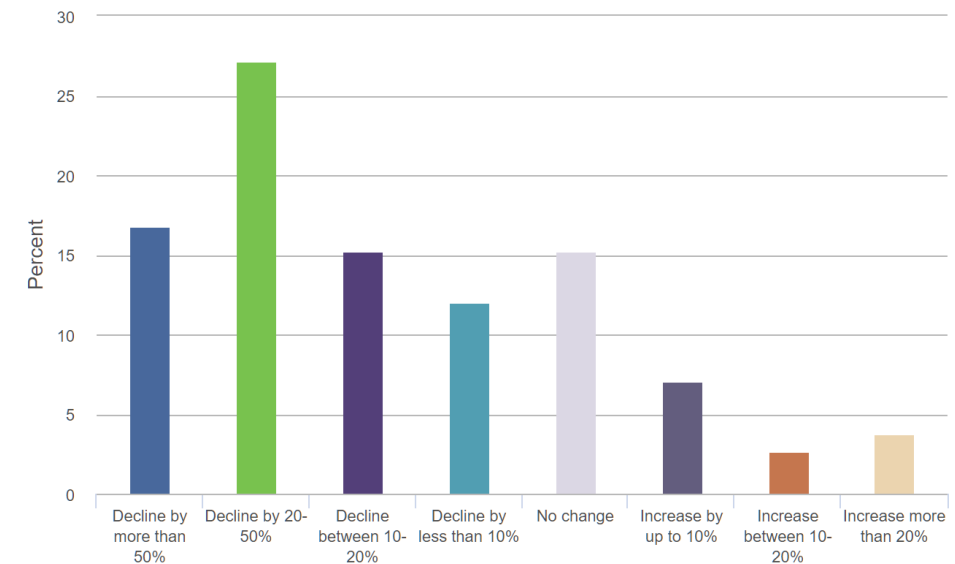
How has the COVID-19 pandemic impacted your PART A monthly census?



62% of all respondents experienced a **decline of more than 10%** to the PART A monthly census while almost 15% experienced **no change** as a result of the COVID-19 pandemic.

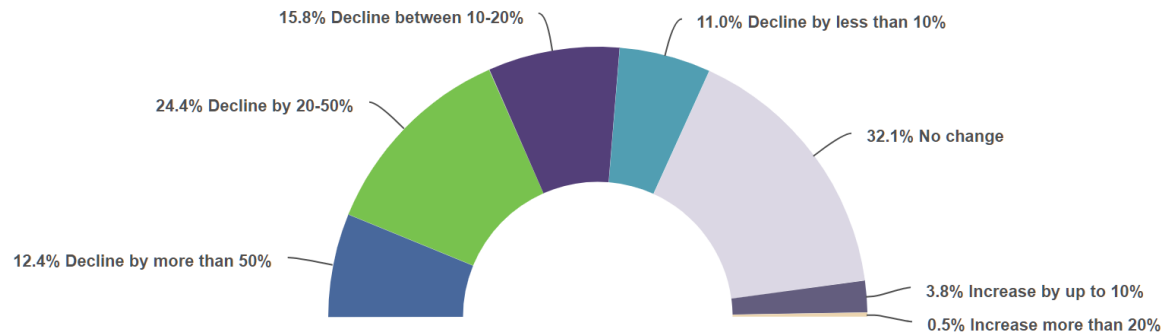
When extracting the impact to the PART A monthly census specific to Skilled Nursing Facilities (SNF), impact trends follow a consistent trend in comparison to all facility types.

Skilled Nursing Facility (SNF)



Crisis Impact to Managed Care Monthly Census

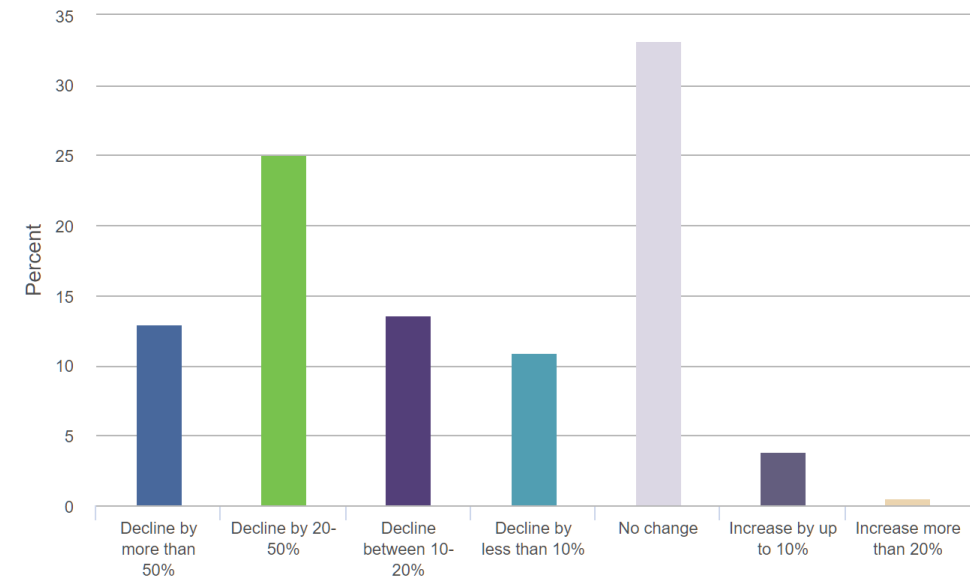
How has the COVID-19 pandemic impacted your Managed Care monthly census?



53% of all respondents experienced a **decline of more than 10%** to their Managed Care monthly census while 32% experienced **no change** as a result of the COVID-19 pandemic.

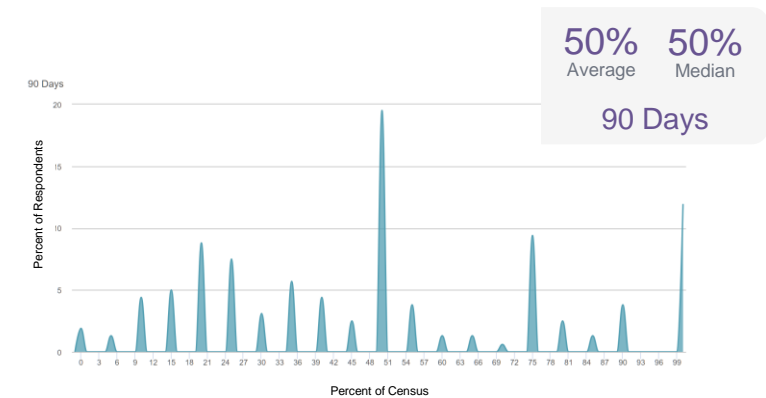
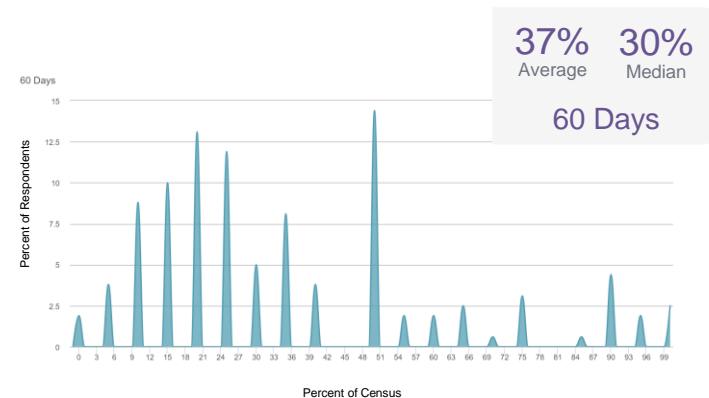
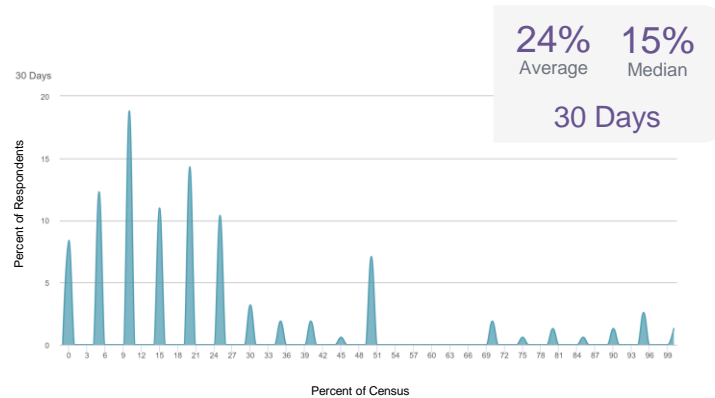
Similarly to the PART A census, when extracting the impact to the PART A monthly census specific to Skilled Nursing Facilities (SNF), impact trends follow a consistent trend in comparison to all facility types.

Skilled Nursing Facility (SNF)



Census Build Back Over Time

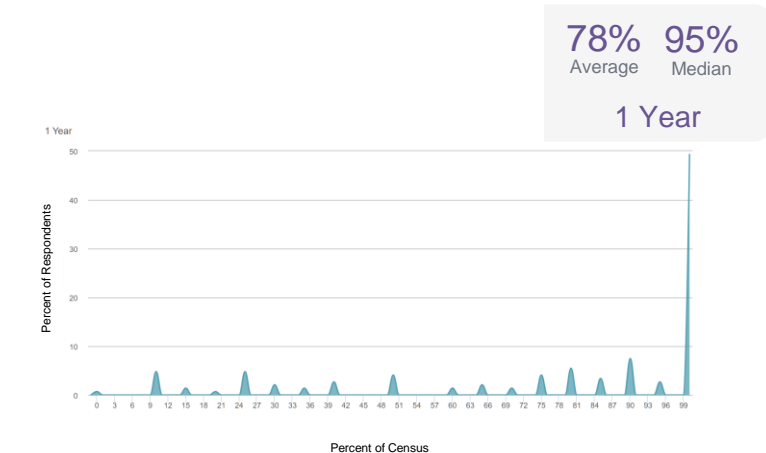
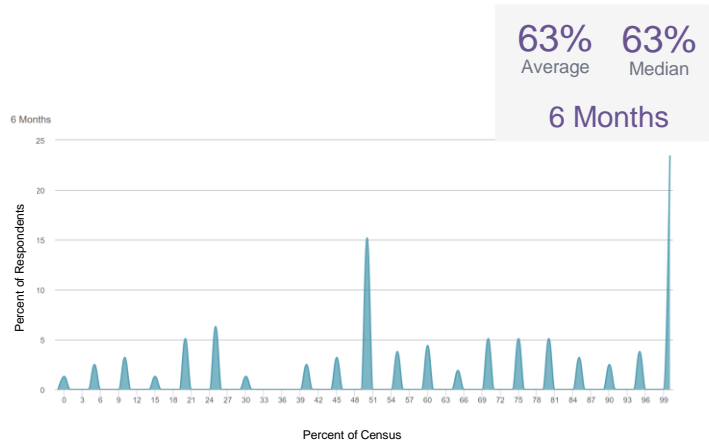
What % of your total census do you anticipate will build back over each of the timeframes listed?



The Average and Median percentages denote the census anticipated to be built back over the next 30 days, 60 days, 90 days, 6 month and 1 year.

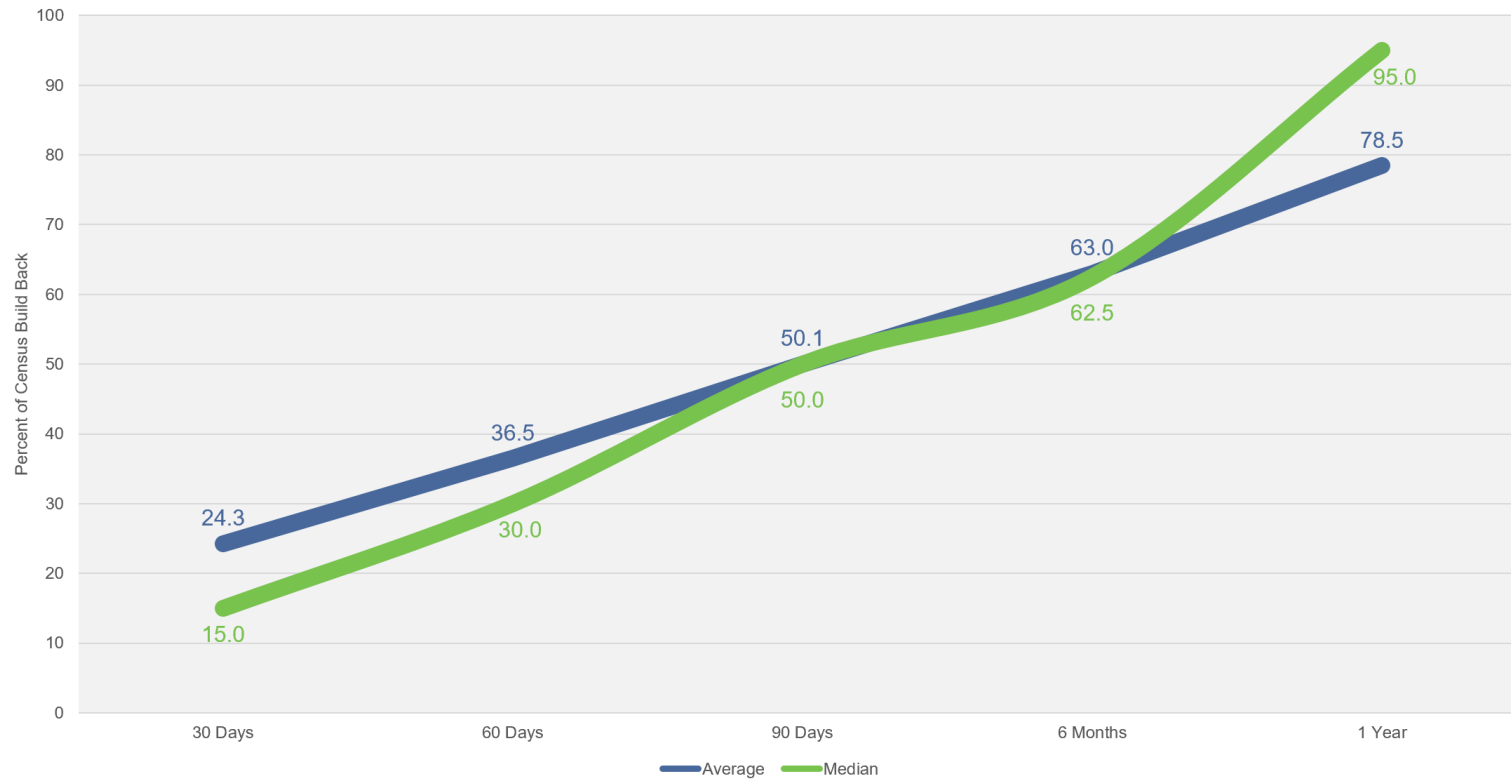
The peaks illustrate the largest percentage of respondents for each timeframe. The average census build back for the next 30 days is 24%, however most respondents believe only 10% of their total census will return in the first month. The Median result is 15%.

In 60 days peaks occur at the 20% and 50% marks. In 90 days, the peak, median and average are each 50%.

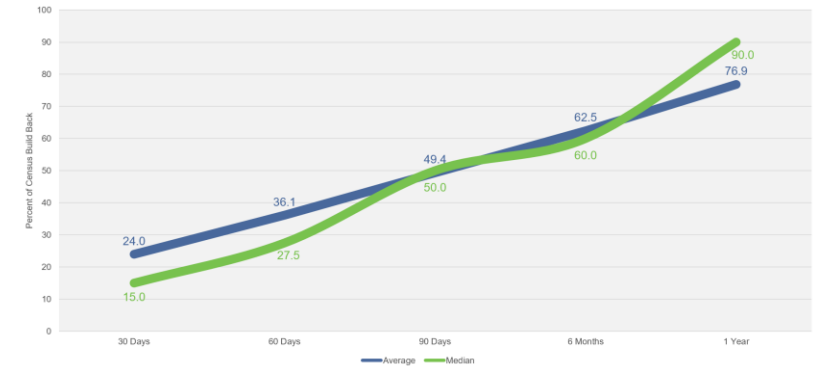


Census Build Back Over Time

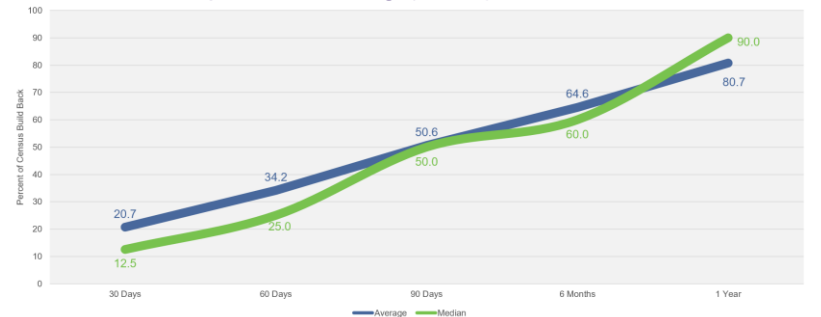
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Skilled Nursing Facility (SNF)

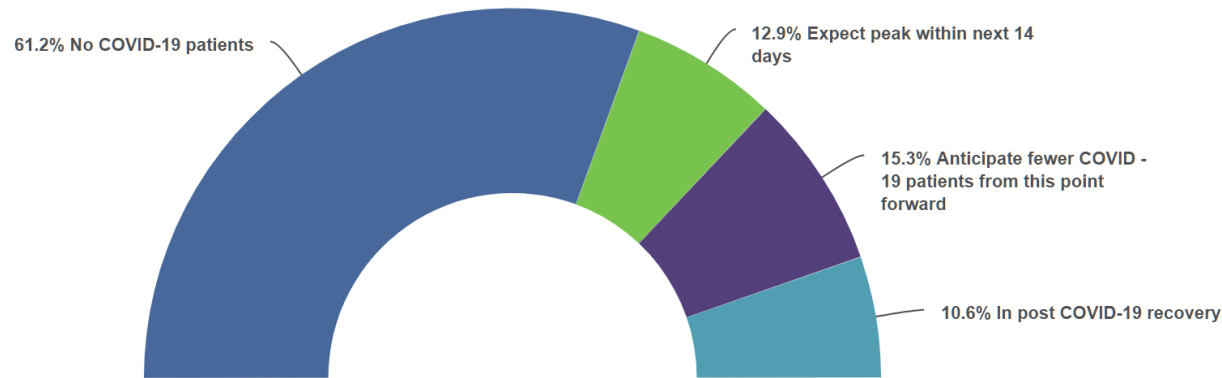


Assisted/Independent Living (AL/IL)



COVID-19 Recovery/Reopening Status

In COVID-19 recovery/reopening, which matches your current status?



Value	Percent
No COVID-19 patients	61.2%
Expect peak within next 14 days	12.9%
Anticipate fewer COVID -19 patients from this point forward	15.3%
In post COVID-19 recovery	10.6%

More than 60% of respondents indicated at the end of June 2020, there have been **No COVID-19 patients**.

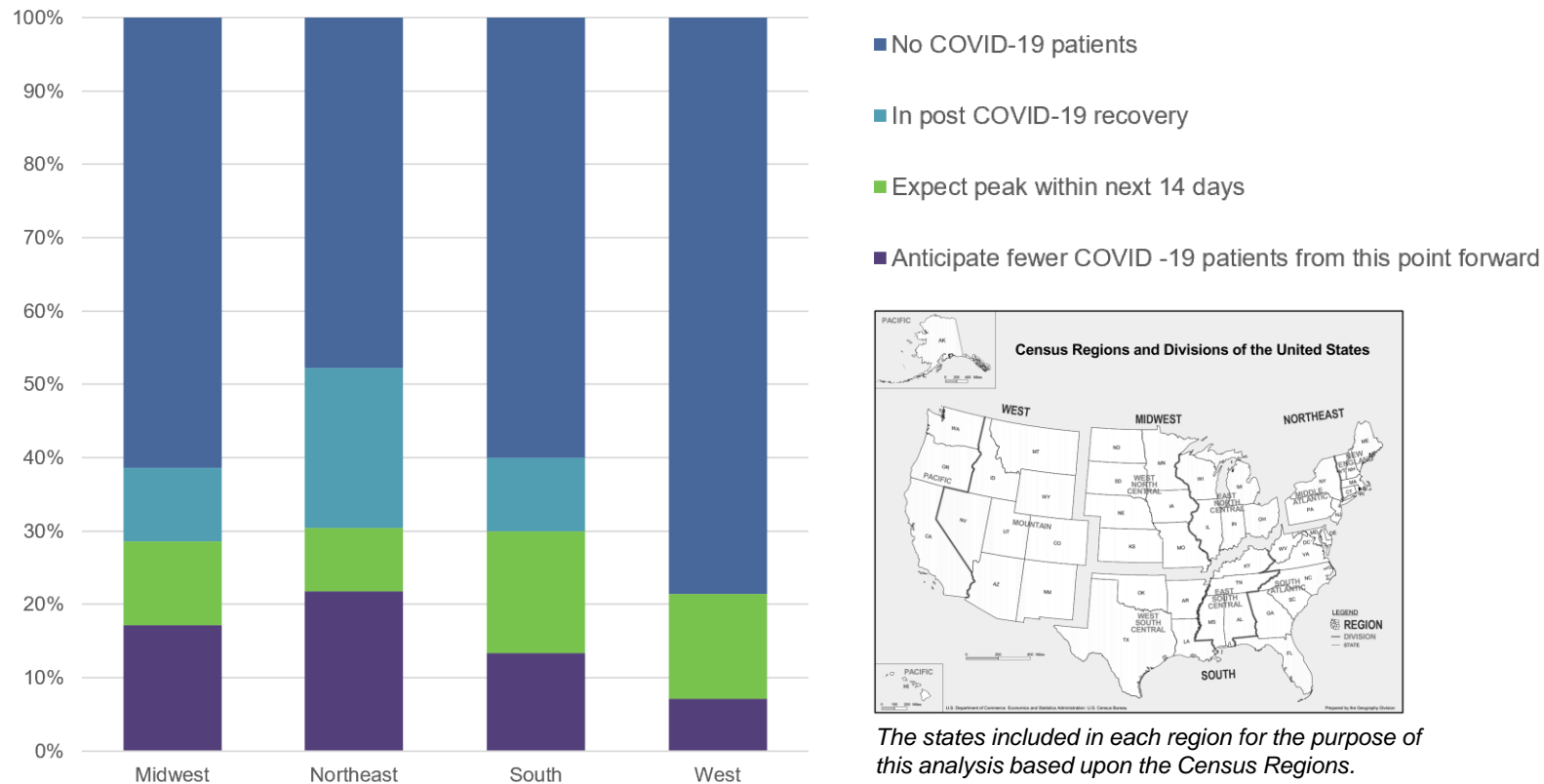
Almost 13% were **Expecting the peak of cases within the following 2 weeks** and when segmenting by facility type, a larger portion of that group from Assisted/Independent Living (AL/IL) facilities.

A combined 26% anticipate fewer patients or are in post COVID-19 recovery.



COVID-19 Recovery/Reopening Status by Region

In COVID-19 recovery/reopening, which matches your current status?



From the overall survey responses at the end of June 2020, responses were tallied by region to illustrate the percentage of facilities in each status.

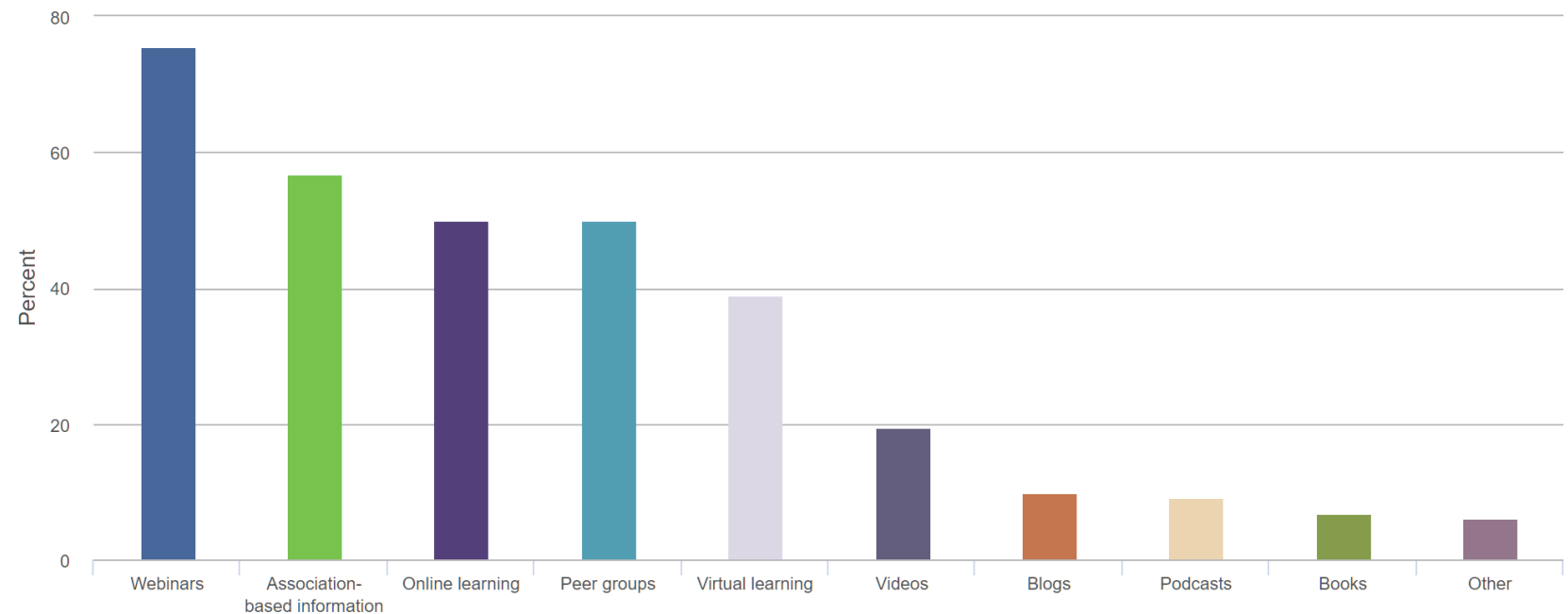
Facilities in the West Region had the highest number of survey responses indicating **No COVID-10 patients**, and there were no facilities with the status of **In post COVID-10 recovery**.

Personal Development Investments

What investments in your personal development as a result of the pandemic have been the most impactful?

76% of respondents indicated **Webinars** as a primary source of personal development followed by **Association-based information** (57%). Exactly half (50%) of respondents participated in **Online learning** and **Peer groups**.

Other impactful investments include reading CDC/CMS resources, reports and studies, and regulatory communications.





About

RehabCare

RehabCare is a leader and premier provider of physical, occupational and speech-language rehabilitation services with services in 47 states. As a part of Kindred Rehabilitation Services, a division of Kindred Healthcare, RehabCare provides contract therapy services across multiple settings including skilled nursing facilities (SNFs), assisted living facilities (ALFs), independent living facilities (ILFs), continuing care retirement communities (CCRCs) and outpatient facilities.

Survey

The Impact & Outlook Survey was developed and facilitated by Butler Street in the month of June 2020 on behalf of RehabCare. Reporting and analysis completed by Butler Street, a management consulting, training and research firm comprised of knowledge sharing, experienced C-Level executives who help companies achieve lasting results in the two most challenging areas they face: Client Development and Talent Development.

