



THE FOUNDATION FOR EXCELLENCE IN MENTAL HEALTH CARE

INAUGURAL REPORT

2012-2013

This publication is available on the EXCELLENCE website (www.mentalhealthexcellence.org)

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Top left: Courtenay Harding, Bill Anthony, Virgil Stucker, Bob Nikkel, Sandra Steingard, Fran Silvestri (Board Chair), David Healy, Pat Stern, Don Cooper, Louisa Putnam, Tom Pyle, Dan Fisher, Gina Nikkel. Not pictured: Larry Davidson



Gina Nikkel, PhD, President & CEO

Dear Friends,

We welcome you to view the inaugural annual report of The Foundation for Excellence in Mental Health Care. We encourage you to get to know us, become a part of us, and help build your dream that is part of creating EXCELLENCE in mental health care.

As you will see in the pages of this annual report, we have laid the ground work for a strong, vibrant international community foundation that focuses on the legacy of mental health recovery.

Each fund, each project is working toward providing hope, respect, choice, and partnership in supporting research, education, and programs that foster recovery for people and their families who experience mental health challenges.

Our passion to get this right is enhanced by a robust Scientific Advisory Committee, a Marketing Committee, a Development Committee, and many allies across the globe. We believe that the people who have had successes and who have been harmed on their journey through mental health “care” are our best teachers.

We pay tribute to the many up-and-coming funds that have been created in our first two years and to our remarkable donors, volunteer leaders, and grantees. We pay special tribute to the late Dr. Dean Brooks.

We look back on our first two years with pride in our work together and count on your involvement and support as we continue to build a strong legacy for EXCELLENCE in mental health care!

Sincerely,

Fran Silvestri, MBA, Board Chair

A Global Community, One Heart

EXCELLENCE is an international mental health community foundation which matches private philanthropy to non-biased research and programs that lead to recovery.

Our donors and volunteers are an intellectually and culturally rich team of people who embody lived experience of our current system of care, family members, psychiatrists and other clinical professionals, researchers, and philanthropists.

OUR CALL TO ACTION

We were called to action in 2011 by the now inescapable evidence of the grave harm that our modern prescribing practices are exacting on the health of both adults and children with mental health challenges.

Recovery means

a person is successful and satisfied in the living, working, learning, and social environments of their choice.

A THREE-FOLD STRATEGY

The problems and the answers are not simple ones and so we commit our funds and resources with both precision and diversity.

Research - Grants from our General Research Fund and donor-advised funds drive research that is free from the influence of the pharmaceutical industry and aims to determine the optimum use of prescription drugs and explore viable alternatives to medication.

Recovery program development - Tools that provide real alternatives to medication are to be found and are in development in pockets of excellence around the world. Our donors support the growth and dissemination of effective recovery-oriented programs.

Education - Recovery-oriented continuing education curricula, professional symposia, family education and support groups, community dialogues and educational films are just some of the ways EXCELLENCE donors are changing the conversation and getting the expectation of recovery into the mainstream.

Adapting Open Dialogue to the United States

Open Dialogue began in Finland in the 1980's as an experimental approach to acute psychiatric crisis. A variety of research studies over the years have honed the methodology and revealed consistently impressive recovery outcomes.

The EXCELLENCE-funded project to adapt this approach to the United States includes principal investigator Doug Ziedonis, MD at the University of Massachusetts Medical School, co-investigator Mary Olson, PhD, Jon Delma, PhD, and Dan Fisher, MD, PhD in collaboration with Finnish developer Dr. Jaakko Seikkula.

Replication tools will include clinical manuals, fidelity scales and training in organizational change and psychosocial therapy and an implementation guide for new cultures and settings.

GRANT SOURCE: **Bill Anthony General Research Fund**
AMOUNT: **\$200,000**

7 Main Principles for Open Dialogue

Immediate help

Social network perspective

Flexibility & mobility of treatment

Responsibility

Psychological continuity

Tolerance of uncertainty

Dialogue & polyphony

67% of participants forgo antipsychotics without relapse at the 5-year marker.

Mining the Treasure Trove

Over the last 30 years, Dr. Martin Harrow, MD, Professor and Director (Retired) of the Department of Psychiatry at the University of Illinois College of Medicine, has collected data from over 1,000 interviews from people who have lived experience with mental illness. His research has been the basis for a number of papers revealing the effect of medications on those he interviewed, including the most recent with Thomas H. Jobe, published by the Schizophrenia Bulletin in March 2013:

Does Long-Term Treatment of Schizophrenia With Antipsychotic Medications Facilitate Recovery?

Further analysis of the data will answer several questions to provide the basis for a series of important papers to better understand the long term effects of anti-psychotics in the treatment of schizophrenia.

GRANT SOURCE: **Bill Anthony General Research Fund**
AMOUNT: **\$50,000**



Caring for children

Addressing what will likely prove to be one of the great moral failures of our time, the over-prescribing of psychotropic drugs to children, Drs. Michael Murphy and Lee Baer at Massachusetts General Hospital embarked on a two-step research project.

They began by evaluating the proposed national quality standards for children's mental health care and went on to articulate a stepped-care standard for treating depression and ADHD in children, including a critical review of existing and potential evidence.

Their results and conclusions have been accepted for publication by the Harvard Review of Psychiatry.

GRANT SOURCE: **Bill Anthony General Research Fund**
AMOUNT: **\$35,830**



A Collaborative Pathway for People with Early Psychosis

Three-quarters of the way into their two-year grant period, Dr. Chris Gordon and his team at Advocates, Inc. in Framingham, Massachusetts report impressive preliminary outcomes and a high level of satisfaction from everyone involved. Research data is being collected in partnership with the BU Center for Psychiatric Rehabilitation.

The Collaborative Pathway process engages young people at the start of their encounter with the mental health system to change their trajectory from disability and chronicity to recovery-oriented self-direction. The person in crisis is engaged in a way that includes them and their support system in treatment decisions from the very start, using clear, everyday language to make decision-making accessible.



The Collaborative Pathway uses a recovery-oriented mobile crisis team to deliver services in the home whenever possible, avert unnecessary hospitalization and build on the person's and family's strengths and preferences. The model uses shared decision-making and informed choice about neuroleptic medications to apply "collaborative psychopharmacology" principles, honoring as an option the possibility of using little or no neuroleptic when that is the patient's and family's preference and opting for benzodiazepines for symptomatic relief of anxiety and insomnia, again if this is the person's and family's preference. Such neuroleptic delay or minimization has been demonstrated to result in no long-term negative consequences, allowing individuals and families time to collaborate on treatment decisions.

GRANT SOURCE: **Bill Anthony General Research Fund**
AMOUNT: **\$103,908**



PJ Moynihan &
Oryx Cohen,
Filmmakers

Healing Voices Film Fund

Healing Voices is a narrative documentary currently in production. Healing Voices will chronicle the lives of a few people who experience mental health issues, extreme states, and/or trauma in real time, as well as featuring some foundational characters who have made incredible recoveries mostly by finding alternatives to our current medical model. Making appearances in the film will be many of the leaders of the consumer/survivor/ex-patient movement in mental health from around the country. Goal: \$250,000

FUND TYPE: **Donor-Advised Fund**
FUND ADVISORS: **PJ Moynihan & Oryx Cohen**





Voice-hearers support one another along the journey of self-discovery and healing.

Gail Hornstein, PhD, Author & Researcher, Mt Holyoke College and Jacqui Dillon, National Chair, Hearing Voices Network, England



Hearing Voices Research & Development Fund

For the past 25 years, the Hearing Voices Network – an international collaboration of professionals, people with lived experience, and their families and friends – has been working to develop an alternative approach to coping with voices, visions, and other extreme states that is empowering and useful and does not start from the assumption that people who have these experiences suffer from a chronic illness.

A large body of research data, published in major professional journals, now provides support for key aspects of this approach, and the hundreds of peer-support groups that have developed in 20 countries around the world are enabling voice hearers – even those who have been chronically disabled – to learn to cope more effectively or rid themselves of the negative effects of their voices. These groups are now starting to spread across the US, but the lack of a systematic program for training potential facilitators and others interested in incorporating the Network's approach into their research or teaching is holding back this effective, community-based psychosocial alternative to the current risky practice of large-dose, long-term treatment with neuroleptic drugs.

FUND TYPE: **Donor-Advised Fund**

FUND ADVISORS: **Gail Hornstein, PhD & Jacqui Dillon**



Rxisk

your free, independent drug safety website

Get the real story. Give the real story.

Research

a prescription drug to see what side effects have been reported

Report

your experience and get a personalized RxISK Report to take to your doctor or pharmacist

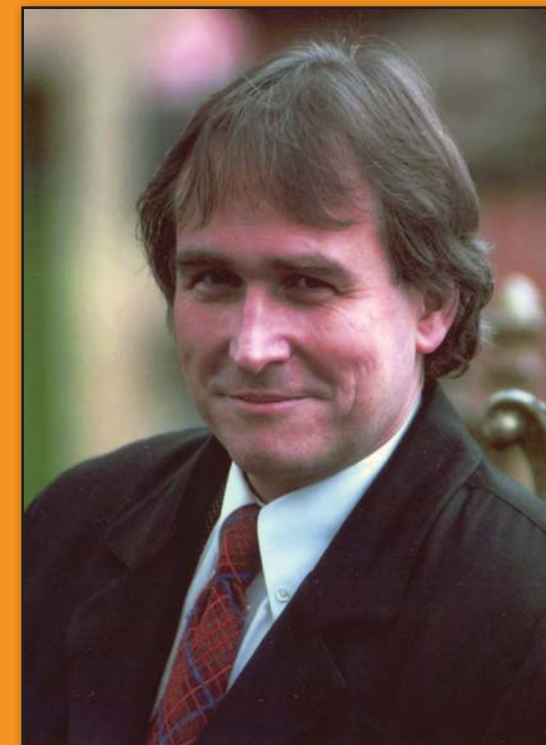
Help us make medicines safer for all of us.
Your personal details will not be shared, only your experience.

Rxisk.org

RxISK Fund

Drug side effects are now a leading cause of death, disability, and illness. Experts estimate that only 1–10% of “serious” adverse events (those causing hospitalization, disability, or death) are ever reported. Not to mention the millions of “medically mild” adverse drug events that occur each year — ones that compromise a person’s concentration, functioning, judgment, and ability to care.

RxISK is the first free, independent website where patients, doctors, and pharmacists can research prescription drugs and easily report a drug side effect — identifying problems and possible solutions earlier than is currently happening.



Professor David Healy, MD, Psychopharmacologist & Author

EXCELLENCE Board Member Dr. David Healy is an internationally respected psychiatrist, psychopharmacologist, scientist, and author. A professor of psychiatry in Wales, David studied medicine in Dublin and at Cambridge University.

He is a former Secretary of the British Association for Psychopharmacology, and has authored more than 150 peer-reviewed articles, 200 other pieces, and 20 books, including *The Antidepressant Era* and *The Creation of Psychopharmacology* from Harvard University Press, *The Psychopharmacologists Volumes 1-3* and *Let Them Eat Prozac* from New York University Press, and *Mania* from Johns Hopkins University Press.

Mother Bear: Families for Mental Health Fund

Mother Bear embraces the values and the vision of the mental health recovery movement, pioneered by those with lived experience, which has repeatedly demonstrated that recovery from even severe emotional states is not only possible, but should be expected.

Recovering Our Families Online Learning & Support

In partnership with Families Healing Together and Family Outreach and Response of Toronto, Canada, Mother Bear staff supported the launch of an online learning and support community for anyone interested in growing their skills in recovery support.

Curriculum performance was evaluated by a research team at the University of Northern Colorado which found a significant improvement in participants' hopefulness toward recovery, mental health coping skills, and boundaries & role clarification.



**Families
Healing Together**

"This course was so helpful for me. We had a very difficult start to the fall with our daughter. She was going through a tough period and needing some help around learning how to manage her powerful emotions. This course was extremely helpful!"

Firstly, by introducing Turnaround people, then by learning about how to communicate in an effective manner and finally by developing clear boundaries in our home. Because of this we are now enjoying a beautiful new kind of relationship with our daughter. Thank you!!"

- Course participant

FUND TYPE: **Incubator Fund**
FUND ADVISOR: **Lisbeth Riis-Cooper**



Paul Fugelsang, Therapist

Social entrepreneur and seasoned therapist Paul Fugelsang is making his dream a reality by opening an Incubator Fund with EXCELLENCE.



Open Path Psychotherapy Collective Fund

There are many people in need of mental health care who find themselves in a bind: earning too much to qualify for government assistance and too little to afford a weekly or even every-other-week session with a qualified psychotherapist, psychologist, or social worker. No more. Open Path Psychotherapy Collective is a network of like-minded mental health clinicians dedicated to reaching those individuals and families who are falling through the cracks. The Collective, with the support of the Foundation for Excellence in Mental Health Care, matches participating clinicians with individuals in need of local, in-office mental health care for a steeply reduced rate.

Open Path Psychotherapy Collective bridges the invisible economic gulf between qualified mental health professionals and the Americans who need them. Charitable contributions help maintain and grow the site and aid in recruiting and screening qualified mental health clinicians and reaching the people in need of care.

FUND TYPE: **Incubator Fund**
FUND ADVISOR: **Paul Fugelsang, MA, LPC**



Dan Fisher, MD, PhD

Psychiatrist and author Dan Fisher is a person who has recovered from schizophrenia. He was hospitalized several times prior to becoming a psychiatrist. He is one of the few psychiatrists in the country who publicly discusses his recovery from mental illness.

Dan is the founder and executive director of the National Empowerment Center and travels to all parts of the country to conduct workshops, give keynote addresses, teach classes, and organize conferences for consumers/survivors, families, and mental health providers to promote recovery of people labeled with mental illness by incorporating the principles of empowerment.

Recovery of Community Life through Dialogue Fund

The Recovery of Community Life through Dialogue Fund was established by the Dialogical Recovery Coalition "to create a society which nourishes the life force in each and every living being through dialogical relationships."

eCPR and Intentional Peer Support are two of the core trainings offered by the Coalition. Intentional Peer Support provides a powerful framework for creating peer-to-peer relationships in which both people learn and grow together.

Emotional CPR (eCPR) is a public health education program designed to teach people to assist others through an emotional crisis by three simple steps: C = Connecting, P = emPowering, and R = Revitalizing.

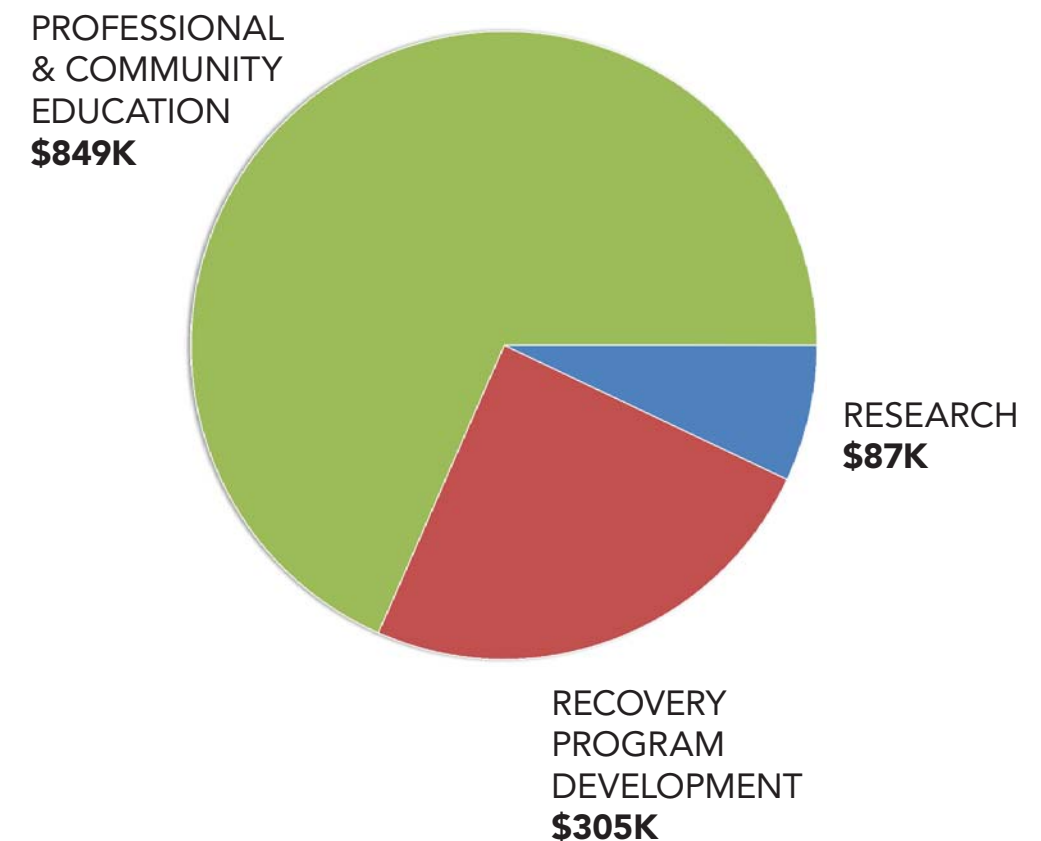
FUND TYPE: **Donor-Advised Fund**

FUND ADVISORS: **Dan Fisher, MD, PhD**

Dialogue is

a deep conversation between people authentically and respectfully sharing in ways that generate new meaning and new narratives in the present moment. It is contrasted to monologue during which people rehearse their old, personal narratives without regard for others' point of view. Open Dialogue and emotionalCPR are examples of dialogical approaches.

2012-2013 GRANTS



TOTAL GRANTS: \$1,241,032

A Family of Funds

By the end of 2013, EXCELLENCE had awarded \$1.2M in grants through its family of funds.

The Bill Anthony General Research Fund

The General Research Fund has supported the following projects:

- **Collaborative Pathway Early Psychosis Project** | Chris Gordon, MD, Boston University Center for Psychiatric Rehabilitation
- **Adapting the Open Dialogue Model in the United States** | Doug Ziedonis, MD, UMass Medical School
- **Evaluation of proposed national quality standards for children's mental health care** | Michael Murphy, EdD, Massachusetts General Hospital, and Lee Baer, PhD, Harvard
- **Beginning analysis of his thirty years of data on the long-term use and outcomes of antipsychotics for schizophrenia** | Martin Harrow, PhD, University of Illinois College of Medicine

Incubator Funds

- **Mother Bear: Families for Mental Health** | Its recovery education and support programs are unique in providing online courses and peer support for family members, individuals and care providers to learn and share together in a healing community. Don & Lisbeth Cooper, Advisors
- **Open Path Psychotherapy Collective** | A network of like-minded mental health clinicians dedicated to reaching individuals and families who can neither afford therapy sessions nor qualify for government aid. The Collective matches participating clinicians with individuals in need of local, in-office mental health care at a steeply reduced rate. Paul Fugelsang, MA, LPC, Advisor

Donor-Advised Funds

- **RxISK Fund** | Collects and shares self-reported consumer data on prescription drug side effects. Dr. David Healy, MD, Advisor
- **National Dialogue Fund** | Acts as the fiscal manager for philanthropic support of local dialogues.
- **Hearing Voices Research & Development Fund** | Brings the UK's well-established hearing voices peer support infrastructure to the United States in conjunction with research led by Dr. Gail Hornstein, Professor of Psychology at Mt. Holyoke College, and Jacqui Dillon.
- **Healing Voices Film Fund** | A narrative documentary project, chronicling the lives of people who experience mental health issues, extreme states, and trauma; it features some who have made incredible recoveries, with cameos by many leaders of the consumer/survivor/ex-patient movement in mental health from around the country. PJ Moynihan & Oryx Cohen, Advisors

- **Recovery of Community Life through Dialogue Fund** | Supports the development of the Dialogical Recovery Coalition, with a commitment to creating opportunity for dialogical practices throughout the U.S. Dr. Dan Fisher, MD, Advisor
- **Recovery Innovations Fund** | Supports the expansion of Recovery Innovations centers. Eugene Johnson, MSW, Advisor
- **CooperRiis Replication Fund** | Supports the expansion of healing communities. Don & Lisbeth Cooper, Advisors
- **Empathic Therapy Fund** | Supports research, education, publications and conferences that foster caring, respectful human relationships. Dr. Peter R. Breggin, MD, and Ginger Ross Breggin, Advisors
- **Holistic Healing Fund** | Established to support a long-term, multi-center, naturalistic study for the treatment of psychiatric conditions using conventional or integrative/holistic models. Dr. Michael Gurevich, MD, Advisor
- **International Society for Ethical Psychology and Psychiatry's New Standard of Care Fund** | Supports projects which identify, study and promote safe, humane approaches to helping those with mental health disorders.
- **American Association of Community Psychiatrists Fund** | Will assist with innovative projects in community psychiatry.
- **Dorothea Dix Think Tank Fund** | Created by Dr. Dean Brooks to support measures to decriminalize mental illness.
- **Anatomy Fund** | Established to support the distribution of Rober Whitaker's book Anatomy of an Epidemic to further professional and community dialogues on better prescribing practices.
- **Libby Gentile Fund** | Supports dual-diagnosis research and programs. Larry Gentile, III, LLM, Advisor
- **LJF Fund** | Focuses on research and programs in keeping with the Foundation's mission.
- **Dr. Paul J. Fink Fund** | Supports a mentoring and education program for at-risk street youth in Philadelphia before they encounter a trauma that can lead to mental illness and violent crime.

Foundation General Fund for Operational Expenses

The General Fund for Operations keeps the core of EXCELLENCE thriving by covering staff payroll, office expenses and the costs of hosting symposia and conferences on emerging recovery practices.

For more information on current EXCELLENCE funds and projects, please visit www.mentalhealthexcellence.org.

Investment Policy

An investment team composed of EXCELLENCE Board members and experts from Gerber/Taylor and the Community Foundation of Western North Carolina provides consulting and recommendations on EXCELLENCE investment activities. Our capacity to achieve our goals is directly tied to the preservation and growth of our financial assets.

The investment funds currently available to EXCELLENCE donors (beyond a money-market cash investment) are the CFWNC Multi-Manager Fund and the CFWNC Conservative Allocation Fund.

While each fund is accounted for separately, the assets of EXCELLENCE are pooled for investment purposes, yielding significant economies of scale. Investment managers are charged with maintaining and increasing the inflation-adjusted value of endowed funds with the goal of meeting charitable distribution and grant-making needs.

INVESTMENT RETURNS

Total annualized rates of return
as of August 2013

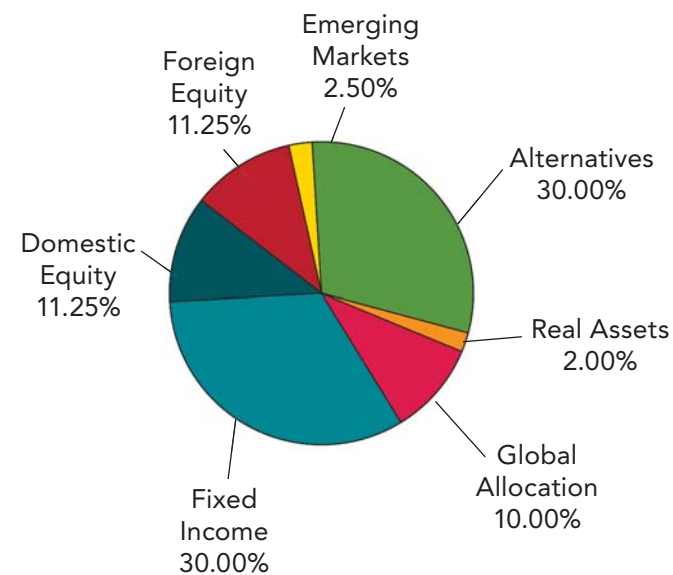
	MULTI-MGR FUND	BENCHMARK*
1 YEAR	15.9%	14.8%
3 YEARS	8.6%	8.8%
5 YEARS	11.6%	11.5%

*60% MSCI World, 40% BC AGG

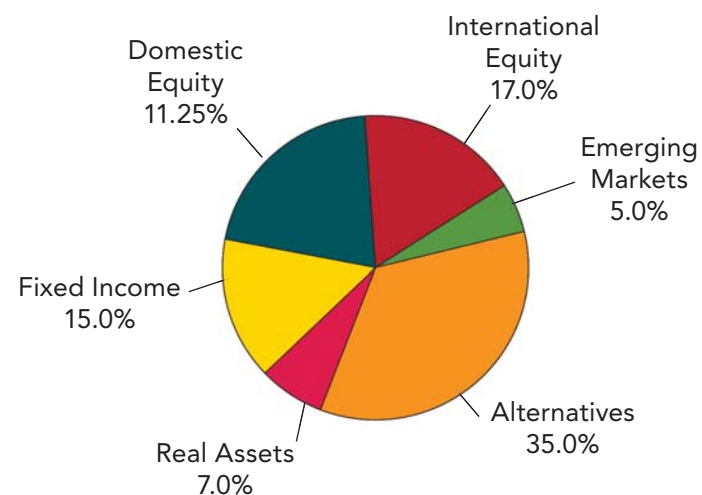
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Tom Pyle, MBA, New Jersey
Virgil Stucker, North Carolina

Conservative Allocation



Multi-Manager Allocation



Financial Statement Highlights

SUMMARY OF CONSOLIDATED STATEMENT OF FINANCIAL POSITION

December 31, 2013

ASSETS	\$
Cash & Cash Equivalent	313,018
Investments	735,984
Contributions receivable	103,150
Other assets	6,415
TOTAL ASSETS	1,158,567
LIABILITIES	
Payables & accrued expenses	55,104
Total credit cards	2,384
Other current liabilities	18,024
TOTAL LIABILITIES	75,512
NET ASSETS	
Unrestricted	912,800
Temporarily restricted	170,255
TOTAL NET ASSETS	1,158,567

SUMMARY OF CONSOLIDATED STATEMENT OF ACTIVITIES

2011-2013

REVENUE & GAINS	\$
Gifts, grants & contributions	3,978,896
Investment income (loss)	163,652
TOTAL REVENUE & GAINS	4,142,548
GRANTS & OTHER EXPENSES	
Grants	775,459
Fund expense & program services	1,851,591
Administrative expenses	771,890
TOTAL GRANTS & OTHER EXPENSES	3,338,940
CHANGE IN NET ASSETS	959,499
NET ASSETS, BEGINNING 2012	123,556
NET ASSETS, END OF 2013	1,083,055

If you would like a copy of financial statements audited by Carter, P.C., call EXCELLENCE's main office at 503-816-5676. Our 990's are available online at www.mentalhealthexcellence.org.

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In Memorium: Dr. Dean Brooks, M.D.

Dr. Dean Brooks established the Dorothea Dix Think Tank Fund to seek ways to decriminalize mental illness.

Dean served as fund advisor and consultant to the think tank members he had selected. These individuals were all friends and long-time advocates for better services for those with mental health challenges who have entered the criminal justice system and all too often end up populating our jails and prisons.

Dr. Brooks expressed great satisfaction with the dialogue that ensued from the Dorothea Dix Think Tank and would be pleased with its recent decision to move this effort into supporting the Saks Institute at the Gould School of Law at the University of Southern California.

Dr. Brooks was the Superintendent of Oregon State Hospital from 1955 to 1982, pioneering innovative treatments for the patients entrusted to his care, including music therapy, outdoor recreation programs and the Superintendent’s Council.

He served on national organizations of state hospitals and in church leadership. His support for the filming of “One Flew Over the Cuckoo’s Nest” made him famous nationally and he used this platform to further address the needs of people assigned to the care of large institutions.

Dean continued to be a powerful advocate for improving mental health services with a special interest in reversing the 30-year trend toward the criminalization of people with mental illness until his passing on May 30, 2013.

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