



FOUNDATION FOR EXCELLENCE
IN MENTAL HEALTH CARE

ANNUAL REPORT

2014

“We match the passion of private philanthropy with the world’s best researchers and programs to bring recovery practices to every community.”

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

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29100 SW Town Center Loop W, Suite 140
Wilsonville, OR 97070
503.816.5676
www.mentalhealthexcellence.org

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Excellence Board of Directors Top left: David Healy, Virgil Stucker, Don Cooper, Louisa Putnam, Fran Silvestri, Dan Fisher, Bill Anthony, Bob Nikkel, Sandra Steingard, Gayle Berg, Courtenay Harding, Gina Nikkel, Giovan Bazan, Patricia Stern.
Not pictured: Larry Davidson & Larry Gentile

Dear Friends of EXCELLENCE,

We want to thank each of our volunteers and donors who helped make this past year successful in moving our mission forward: to connect the passion of private philanthropy with the world's top researchers and programs to bring recovery-based practices to every community.

Throughout this report, you will see the projects and funds that are providing hope and partnership in supporting research, education, and programs that foster recovery for people and their families who experience mental health challenges. In addition, we outline our new continuing education classes for professionals. We also pay special tribute to one of our donors, the late Dr. Paul Fink.



Here is my challenge to you! There is so much more we can do together to make an impact. As a community foundation intent on leaving the legacy of mental health recovery and providing efficient financial stewardship, we rely on your continued dedication of time and resources. As you browse through these pages, please consider a donation and let us know where you would like your support focused. If you can give of your time, talk to us about volunteer opportunities and endorse us by getting your friends to like us on Facebook and Twitter, subscribe to our YouTube channel or by sharing our eNewsletters.

Thank you for taking part in building the EXCELLENCE community. I know we can continue to count on you!

Gina Firman Nikkel, PhD
President & CEO

2014 *in Review*

Generous donors made and matched a \$250K challenge grant to keep *Excellence's* operations moving forward.

Mad in America Continuing Education Fund launched its first online classes.

Excellence partnered with UMass Med School and Boston University researchers to improve early psychosis intervention.

Dr. Martin Harrow's *Excellence*-funded recovery research was published and cited on the national stage.

Our donors supported 21 charitable funds and gave \$207K in grants for recovery research, program development & education.

ALL HANDS ON DECK FOR RECOVERY

Excellence is an international community foundation which matches philanthropists around the world with promising independent mental health research projects and recovery programs.

Our team of donors and volunteers embodies a rich diversity of knowledge and expertise including people with lived experience of our current system of care, family members, psychiatrists and other clinical professionals, researchers, and philanthropists.

OUR CALLING

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

re·cov·er·y

\ri-'kə-və-rē, -'kəv-rē\

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

A HOLISTIC STRATEGY FOR HOPE AND RECOVERY

The problems and their 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 commercial interests and aims to determine the optimum use of prescription drugs and explore viable alternatives to medication.

Recovery program development - Our donors support the growth and dissemination of effective recovery-oriented programs as we discover them in pockets of excellence all around the world.

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.

Hearing Voices Research & Development Fund

The Hearing Voices Research & Development Fund has two key goals: first, to expand the use of the Hearing Voices approach – a peer-based way of working with voices, visions, and other extreme states that is empowering and useful and does not start from the assumption that such experiences are inherently pathological. Its second goal is to research the mechanisms by which this approach works.

Gail Hornstein and Jacqui Dillon have been working collaboratively for ten years to make the Hearing Voices framework better known across the U.S. In 2014, a specific plan to accelerate this work was presented to the Excellence board and the \$250,000 funding for Phase 1 of the project was quickly secured. Trainers are now being sent into the field to expand the number of hearing voices peer-support groups in five regions of the US and to foster the creation of a stronger regional and local infrastructure for Hearing Voices work over the long term. Check out our website for details on Phase II & III of the project.



FUND TYPE: **Donor-Advised Fund**
FUND ADVISORS: **Gail Hornstein & Jacqui Dillon**

Expanding the Hearing Voices Approach in the U.S.

With the help of a small grant to the Western Massachusetts Recovery Learning Community (www.westernmassrlc.org), web resources offering information about the location of hearing voices groups in the U.S. and about the Hearing Voices approach were developed and made more widely available. In 2015-2016, Western Mass RLC staff, previously trained by Gail Hornstein and Jacqui Dillon, will conduct the Phase I regional trainings with a \$75,972 grant from the Fund.

GRANT SOURCE: **Hearing Voices Research & Development Fund**
AMOUNT: **\$6,000**

Mad in America Continuing Education Fund

Bringing good science back

We live in a world where prescribing protocols are written or underwritten by the pharmaceutical industry and journal articles on drug safety and effectiveness are largely ghost-written by that same industry.

The Mad in America Continuing Education Fund is equipping doctors, counselors and the general public with unbiased research on the risks and uses of neuroleptic drugs as well as a broad array of recovery tools.

The website launched in 2014 now offers accredited online continuing medical and professional education courses, with a diverse catalog of additional offerings slated for release in 2015 and beyond.

Among its first presenters are Martin Harrow, PhD, and Eleanor Longden, PhD; course topics include the effects of

medication on outcomes, both short-term and long-term, bias in psychiatric research and publication, the effects of antidepressant medications on pregnancy, and micronutrients and other alternatives to over-use of psychiatric medications.

For current and upcoming course offerings, visit madinamericacontinuinged.org.

To speed the development of new curricula, make a fund donation at mentalhealthexcellence.org/donate.

FUND TYPE: **Incubator Fund**
FUND ADVISOR: **Robert Whitaker**



Robert Whitaker, MIACE Fund Advisor
Journalist and *Anatomy of an Epidemic* author Robert Whitaker is president of Madinamerica, Inc., whose webzine attracts more than 70,000 readers monthly.

His latest book with co-author Lisa Cosgrove is *Psychiatry Under the Influence: Institutional Corruption, Social Injury, and Prescriptions for Reform*.



Intentional Peer Support Fund

Bringing high quality peer support training to communities in need

Peer support is a growing field and practice that many have found life-changing and which research shows is effective.

Intentional Peer Support is a well-crafted example of what that practice could look like and provides principles and tasks to keep peer support unique from traditional mental health services. For nearly two decades, IPS has trained people all over the world and continuously updates and improves its materials.

Fund donors will speed the expansion of this innovative peer support curriculum to serve a wider variety of cultures and provide scholarships to people and communities who would otherwise not be able to access the training.

FUND TYPE: **Donor-Advised Fund**
 FUND ADVISORS: **Steven Morgan & Christine Hansen**



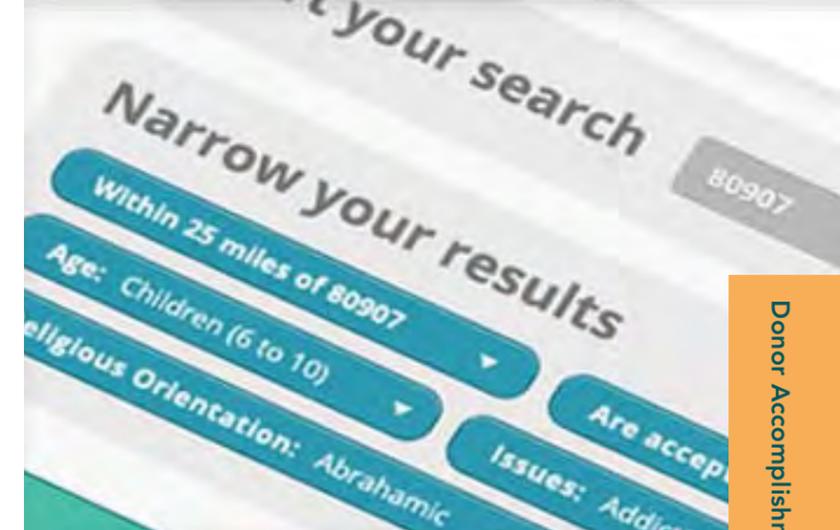
Fund Advisors and IPS trainers Chris Hansen (left) and Steven Morgan.
 Photo credit: Corinna West, Wellness Wordworks; Phil Borges, crazywisefilm.com

Open Path Psychotherapy Collective Fund

Open Path is a dynamic collective of therapists who have generously agreed to provide in-office treatment for \$30 to \$50 per session. Open Path clients pay a one-time membership fee to work with an Open Path therapist at a significantly reduced rate. Because the rate is so low, clients gain back their membership fee after just one session. Many of its therapists also provide sessions online at www.openpathcollective.org.

In 2014, Open Path successfully launched from an Incubator Fund of Excellence to its own 501(c)(3) tax-exempt nonprofit after just two years. Its Excellence donor-advised fund now accepts donations to support further outreach and expansion of this desperately-needed resource.

FUND TYPE: **Donor-Advised Fund**
 FUND ADVISOR: **Paul Fugelsang, MA, LPC**



RxISK.org Fund

RxISK.org Fund donors support the collection, analysis and publishing of patient data and related narratives of actual experiences with medications. The aim is to promote recovery and make medicines safer for all of us, by integrating quality research data with clinical expertise and patient values.

Prescription-drug-induced adverse events are a leading cause of death and disability. There are thousands of additional adverse effects that have been linked to medications though they may not be in a drug manufacturer's data sheet.

In 2014, RxISK.org expanded its resource offerings to include personalized online consultation to help individuals with questions about their prescription drugs, supplements and vitamins. Visit econsult.rxisk.org for more information.

FUND TYPE: **Donor-Advised Fund**
FUND ADVISOR: **David Healy, MD, FRCPsych**



Help Your Doctor Help You

RxISK.org visitors can generate an instant expert report with a summary and timeline of their drug side effects to help them talk with their prescriber and make needed changes to their medication plan.

Each report includes a unique weblink for the prescriber to log in to RxISK.org and contribute to the side-effects database by adding their professional insight to their patient's report there.

This process will aid prescribers in improving the quality of their practice methods and allow RxISK to build a registry of prescribers who listen to their patients and flag prescribers who don't.

Helping patients connect with doctors who listen will promote patient recovery and directly aid in the improvement of medical practice as a whole.

The world is a big place. It can feel like you're fighting the good fight all alone and without the tools you need to make a real difference.

Excellence makes our world smaller, drawing recovery-minded leaders from all fields and walks of life to do together what we cannot do alone. We are a community that encourages, empowers and equips one another to spread hope and share the tools for recovery across the globe.

Our donors are students and teachers, patients and doctors, people with lived experience of mental health challenges and their family and friends, people of modest means and those with much to give. Some of us swear by our medications and some have sworn them off.

But we each have this in common: we hold and share the flame of hope for recovery. We know that the majority of people with mental health challenges will move through those challenges to a rich, beautiful life. Through the giving of our time, talents, and money, we are collecting and sharing the tools for recovery with the world.

We are better together, and together we are changing the world.





Inner Fire Fund

Inner Fire at Grace Brook Farm in Brookline, Vermont will be a proactive, healing community offering a choice for people to recover from debilitating and traumatic life challenges without the use of psychotropic medications. Construction is expected to begin in the fall of 2015.

Inner Fire grew out of the personal and professional experience of fund advisor Beatrice Birch. Beatrice has an extensive background in the therapeutic and administrative aspects of residential treatment facilities and is a leading practitioner of Hauschka Artistic Therapy and has worked throughout the world in treatment facilities and training institutes. She has applied knowledge from 30 years of professional practice in prisons, inner cities, residential facilities and her own private practice.

Fund donations will cover the cost of capital construction and implementation-phase personnel as well as the projected cash-flow deficit during the ramp-up stage of operations which could be financed with a charitable no-interest loan.

FUND TYPE: **Donor-Advised Fund**
 FUND ADVISOR: **Beatrice Birch**

Donor Brings Adapted Open Dialogue Model to the United States

The Open Dialogue approach is an innovative, recovery-oriented, clinical intervention that engages a person's family or other support network at the time of an acute crisis

Mental health clinicians and researchers at the University of Massachusetts Medical School are completing a third year of grant funding to provide the needed tools to implement the Finnish Open Dialogue model across the United States and around the world. The Finnish data shows excellent outcomes for quality of life, employment, and other aspects of recovery.

The UMass team has developed the first written guide of Dialogic Practice of the Open Dialogue, including a fidelity tool and guide for change at an organizational and programmatic level. The team hopes for additional funds in the future to support dissemination to local programs in the United States and globally.

The Key Elements of dialogic Practice in Open Dialogue: Fidelity Criteria was published online in 2014 and is available in the Excellence Library. The UMass Open Dialogue website has additional information and translations of this guide in other languages for global implementation.



Principal Investigator Doug Ziedonis, MD, MPH shares his passion for leading culture and system change to create environments where people can achieve wellness.



Righting the Ship

Dr. Martin Harrow, PhD, Professor and Director (Retired) of the Psychology Section of the Department of Psychiatry at the University of Illinois College of Medicine, collected data over 30 years from over 1,000 interviews of people with lived experience of mental health challenges. His research is the basis for a number of papers revealing the effect of medications on those he interviewed, including the most recent with Thomas H. Jobe, MD, published by *Psychological Medicine* in March 2014:

“ Does treatment of schizophrenia with antipsychotic medications eliminate or reduce psychosis? A 20-year multi-follow-up study ”

A multi-year *Excellence* grant is funding further analysis of the data to better understand the long term effects of anti-psychotics in the treatment of schizophrenia, including their impact on individuals' ability to succeed at work.

Dr. Harrow's research is already impacting the clinical and public understanding of psychosis and prescription drug use, being cited in a 2014 Chicago Tribune article and by NIMH Director Thomas Insel in his official blog.

GRANT SOURCE: **Lucas Fund**
2014 AMOUNT: **\$25,000**



International Leadership Academy Fund

Transforming lived experiences of mental ill health and recovery into the lived expertise to transform mental health services around the world

The International Leadership Academy Fund aims to prepare persons with lived experiences of mental ill health and recovery to take on leadership roles within their own local, regional, and national systems of care across the globe.

This international leadership academy will be accessible online and on-site at Yale University as well as at partner institutions. The academy may also host seminars, support research and produce theoretical papers, and collect and make available a wide variety of resources for leadership education and system transformation from around the world.

Initial research and planning will take place in partnership with the International Initiative for Mental Health Leadership's annual meeting in September 2015.

Fund donations help to establish academy infrastructure and outreach, including development of the curriculum and online learning platform.

FUND TYPE: **Donor-Advised Fund**
 FUND ADVISOR: **Larry Davidson, PhD**

Dorothea Dix Think Tank Fund

The Dorothea Dix Think Tank was created by Dr. Dean Brooks and challenged by him to use its members' expertise and extensive professional contacts to change policy and practices that will divert individuals with mental health challenges from U.S. jails and prisons to quality care and treatment.

Dr. Brooks served as superintendent of the Oregon State Hospital from 1955 to 1981 and is remembered for the time and care he took to listen and respond to the needs of the residents there.

In 2014, the fund granted \$10,000 to the Saks Institute for Mental Health Law, Policy and Ethics to cosponsor its 2015 symposium on improving mental health on college campuses.

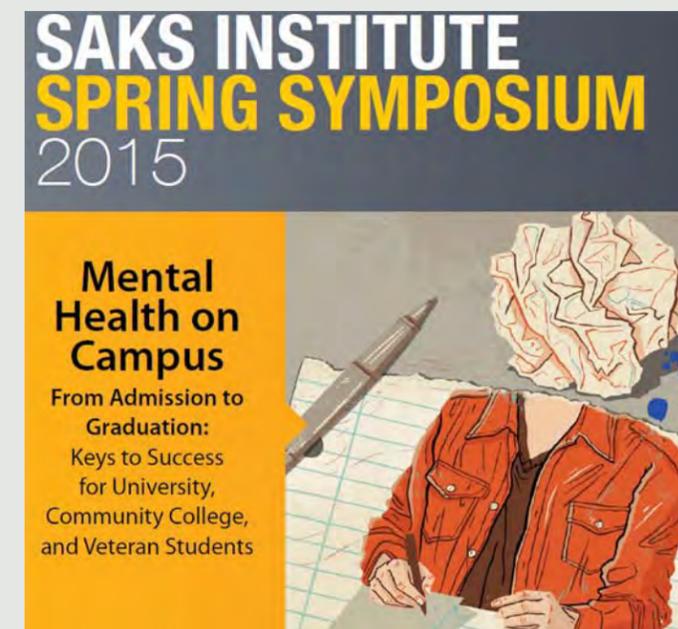
FUND TYPE: **Donor-Advised Fund**
 FUND ADVISORS: **Dennie Brooks, India Civey, & Dr. Ulista Brooks**

2014 Grantee: Saks Institute for Mental Health Law

The Saks Institute for Mental Health Law, Policy and Ethics is a think tank founded to foster interdisciplinary and collaborative research among scholars and policymakers around issues of mental illness and mental health.

Its symposia are held twice a year in the fall and spring; past speakers include Patrick Kennedy, American Psychological Association and American Psychiatric Association presidents, and Judge Steven Leifman, JD, 11th Circuit Court, Miami.

Grant Source: **Dorothea Dix Think Tank Fund**
 Amount: **\$10,000**



Healing Voices Film Fund

Healing Voices is a feature-length documentary slated to premiere in 2015, which asks the question – what are we talking about when we talk about “mental illness”? The film features the stories of individuals who have overcome extreme mental states and stigmatizing psychiatric diagnosis, and those working through extreme states in real time.

Healing Voices champions the spirit of its human portraits as they evolve through experiences that are commonly diagnosed as “serious mental illness”. As they learn to understand and integrate these challenging states into their lives, the film offers and hopes to inspire honest dialogue about the limitations of mainstream mental health care, as well as alternative ways of responding to “madness”.

The fund is currently seeking tax deductible donations to finance marketing and self-distribution. Tiered credits in the production, as well as dedications, are available to interested donors.

Fundraising goal: \$500,000 USD

FUND TYPE: **Donor-Advised Fund**

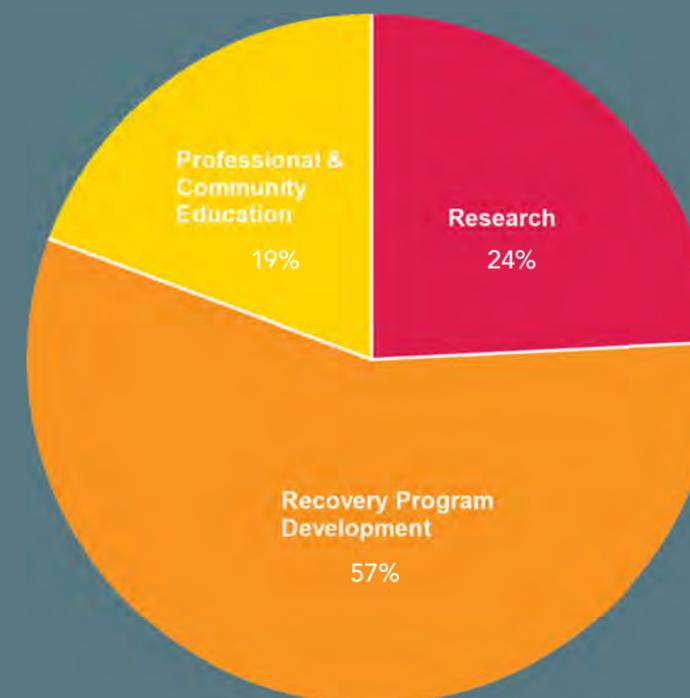
FUND ADVISORS: **PJ Moynihan & Oryx Cohen**



www.healingvoicesmovie.com

For the latest on showing dates and locations and to contribute to the fund, visit www.mentalhealthexcellence.org/projects/healing-voices-film-project.

2014 GRANTS & PROJECTS



TOTAL GRANTS: **\$206,970**

Gayle R. Berg, PhD Endowment Fund

An endowment fund at *Excellence* provides continuous support to the recovery movement by making investments in scientific research, innovative programs and advocacy for quality mental health care.

The Gayle R. Berg, PhD endowment fund sustains Excellence's infrastructure to secure the legacy of hope that the recovery movement brings to people with mental health challenges and to their families and friends.

LEAVING A LEGACY

Gayle R. Berg, PhD is a practicing psychologist in Roslyn Heights, New York. Her legacy gift is invested in a high-yield portfolio and the interest income goes to support *Excellence's* infrastructure.

The mission of this endowment fund is to invest in scientific research which utilizes the latest findings from neuroscience, interpersonal neurobiology, positive psychology and other promising avenues of investigation to inform the development of innovative treatment interventions and programs which can make a measurable difference in people's lives.

In addition, the fund will provide support for creative ways to increase public awareness, decrease stigma and increase access to quality mental health care.

FUND TYPE: **Endowment Fund**
 FUND ADVISOR: **Gayle R. Berg, PhD**



Gayle Berg, PhD (center), with fellow *Excellence* board members Patricia Stern, MBA (left) and Louisa Putnam, LPCC, LMT.



Three easy ways to give, three effective ways to bring recovery to the mainstream.

Excellence is a unique, beautifully structured way to make a difference in a field that is ripe for change and needs your help. Those already committed to the effort include some of the most impressive researchers, thoughtful voices and visionary philanthropists anywhere in the world.

Give to an existing fund

Underwrite independent research. Support a promising new program. Help spread the hope for recovery with education programs for families and health professionals. Ensure that Excellence itself remains strong and able to achieve its goals. When you see what others are doing and back their efforts, progress is fast and rewarding. Flip to the next page for a complete list of current funds.

Create your own fund

Creating your own fund may be an inspired choice, whether you want to focus your giving on a specific area, give directly to nonprofits of your choice, or develop an initiative of your own.

Leave a Legacy

Estate planning gives you the opportunity to give more than at any other time. We will be honored to work with you and your financial advisors to set up the type of giving you would really like to do.

Please talk with us about the many types of funds you can create or support.

A Family of Funds

To date, Excellence has awarded \$1,348,038 in grants through its family of funds.

EXCELLENCE General Fund

Excellence's General Fund keeps core operations thriving, including program staff and symposia and conferences on emerging recovery practices which spread knowledge and gather support around the world.

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 for the U.S.** | 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
- **Continuing 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
- **Clinical Practice Guidelines Study** | Lisa Cosgrove, PhD, UMASS Boston

Children's Adverse Childhood Experiences Prevention Fund

Helps provide support for evidence based prevention activities such as nurse home visiting and early childhood education.

Legal System Education Fund

Promotes the advancement of legal education where it intersects with mental health law.

We work with experts to:

- Increase public understanding of mental health law
- Advance training and practice in application of mental health law
- Support expert witnesses in mental health law cases for the public good
- Support research at the intersection of law, mental health, and ethics
- Influence advocacy actions for improved treatment of people with mental health challenges

Returning Veterans Fund

The Returning Veterans Project will recruit, train and support 150 licensed independent mental health practitioners to provide pro bono services to war zone veterans and their families.

University Partnership Fund

Allows us to support University research by providing small stipends for graduate research assistants to prepare quantitative and qualitative data analyses of research results, as well as assisting with drafting, editing, and otherwise preparing manuscripts to submit for publication.

Dartmouth Psychiatry Innovation Fund

Working in partnership with Dartmouth College, Geisel School of Medicine, Department of Psychiatry to support mental health research, analysis and program design and application.

Endowment Funds

- **Gayle R. Berg, PhD Fund** | An endowment fund that provides continuous support to the recovery movement by making investments in scientific research, innovative programs and advocacy for quality mental health care. *Dr. Gayle Berg, PhD, Advisor*

Endowment Partner Funds

- **Folktime Fund** | Strengthens the peer support activities of Folk Time, Inc. in Portland, Oregon. *Russ & Phyllis Walls, Advisors*

Incubator Funds

- **Mad in America Continuing Education Fund** | Accredited online continuing education for health professionals offers an unbiased, industry-independent review of the evidence base for the short-term and long-term use of psychiatric medications for children and adults. *Robert Whitaker, Advisor*
- **Intentional Peer Support Fund** | Supports ongoing curriculum development and subsidizes peer support training for organizations and individuals in need. *Chris Hansen & Steven Morgan, Advisors*

Donor-Advised Funds

- **American Association of Community Psychiatrists Fund** | Assists with innovative projects in community psychiatry.

- **Anatomy Fund** | Supports the distribution of Rober Whitaker's book *Anatomy of an Epidemic* to further professional and community dialogues on medication optimization.
- **Collaborative Pathway Fund** | Enables the Collaborative Pathway team to serve families of ordinary means by supplementing their health insurance with philanthropic support. Also supports safety and effectiveness research and program replication. *Chris Gordon, MD, Advisor*
- **CooperRiis Replication Fund** | Supports the expansion of healing communities. *Don & Lisbeth Cooper, Advisors*
- **Dorothea Dix Think Tank Fund** | Created by Dr. Dean Brooks to support measures to decriminalize mental illness. *Dennie Brooks & India Civey, Advisors*
- **eCPR Fund** | Supports expansion of Emotional CPR, training people to assist others through emotional crises and making the practice accessible to people around the world. *Dan Fisher, MD, PhD, Advisor*
- **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*
- **Extended Therapy Room Fund** | Supports the growth of a community within Sweden which will provide educational opportunities and support for researchers, clinicians and persons with lived experience to expand their knowledge and skill in mental health recovery practices. *Carina Håkansson, Advisor*
- **Gnosis House Retreat Fund** | Gnosis House provides an affordable psycho-social residential program, modeled after R.D Laings' houses in London, for adults who are experiencing extreme states. *Michael Guy Thompson, Advisor*
- **Healing Voices Film Fund** | A narrative documentary project, chronicling the lives of people who experience mental health issues, extreme states, and/or trauma; feature some who have made incredible recoveries; and cameo many of the leaders of the consumer/survivor/ex-patient movement in mental health from around the country. *PJ Moynihan & Oryx Cohen, Advisors*
- **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 Gail Hornstein, PhD, Professor of Psychology at Mt. Holyoke College and Jacqui Dillon.
- **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*

- **Inner Fire Fund** | Launching a proactive, healing community at Grace Brook Farm in Brookline, Vermont, offering a choice for people to recover from debilitating and traumatic life challenges without the use of psychotropic medications. *Beatrice Birch, Advisor*
- **International Leadership Academy Fund** | Aims to prepare persons with lived experiences of mental ill health and recovery to take on leadership roles within their own local, regional, and national systems of care across the globe. *Larry Davidson, PhD, Advisor*
- **Internt'l Society for Ethical Psychology & Psychiatry's New Standard of Care Fund** | Supports projects which identify, study and promote safe, humane approaches to helping those with mental health disorders. *Michael Gilbert, PsyD, Advisor*
- **Libby Gentile Fund** | Supports dual-diagnosis research and programs. *Larry Gentile, Advisor*
- **Lucas Fund** | Focuses on research and programs in keeping with the Foundation's mission.
- **Nutrition and Mental Health Research Fund** | Strengthens the knowledge base and provides evidence for the use of multi-nutrient formulas. These formulas ease the withdrawal symptoms associated with lowering or titrating off psychiatric medication and as alternatives to beginning pharmacotherapy. *Bonnie Kaplan, PhD, Advisor*
- **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*
- **Reclaiming Childhood Program Development & Research Fund** | Supports programs which help families move beyond the current pharmaceutically-focused model of mental health and apply more holistic approaches in their daily efforts to help social, emotional, and behaviorally-challenged children. *Michael Gilbert, PsyD, Advisor*
- **RxISK Fund** | rxisk.org collects and shares self-reported consumer data on prescription drug side effects. It also offers personalized reports and one-on-one online consultation. *Dr. David Healy, MD, Advisor*
- **Therapeutic Assessment Fund** | Helps train mental health professionals, develop training materials, and conduct research on Therapeutic Assessment. *Stephen E Finn, PhD, Advisor*

For more information on **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.

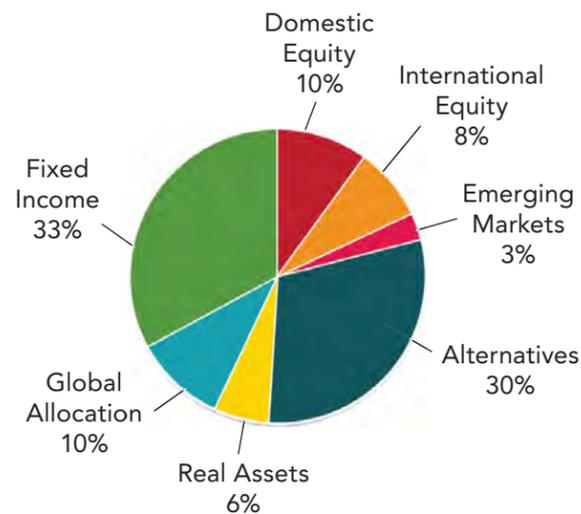
INVESTMENT RETURNS

Investment performance
as of December 31, 2014

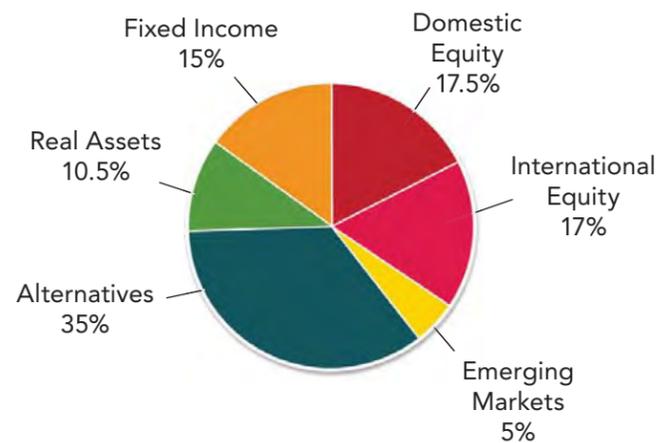
	MULTI-MGR FUND	BENCHMARK*	CONSERVATIVE FUND
1 YEAR	3.6%	5.8%	2.9%
3 YEARS	10.6%	10.7%	7.7%
5 YEARS	8.2%	8.5%	6.3%

*60% MSCI World, 40% BC AGG

Conservative Allocation



Multi-Manager Allocation



FINANCIAL STATEMENT HIGHLIGHTS

SUMMARY OF CONSOLIDATED STATEMENT OF FINANCIAL POSITION

December 31, 2014

ASSETS	\$
Cash & Cash Equivalent	1,102,670
Investments	566,405
Contributions receivable	0
Other assets	0
TOTAL ASSETS	1,669,075

LIABILITIES	
Payables & accrued expenses	4,622
Total credit cards	25,000
Other current liabilities	30,400
Funds held as Organizational Endowments	11,405
TOTAL LIABILITIES	71,427

NET ASSETS	
Unrestricted	1,597,648
Temporarily restricted	0
TOTAL NET ASSETS	1,597,648

SUMMARY OF CONSOLIDATED STATEMENT OF ACTIVITIES

2014

REVENUE & GAINS	\$
Gifts, grants & contributions	1,734,103
Investment income (loss)	(5,849)
TOTAL REVENUE & GAINS	1,728,254

GRANTS & OTHER EXPENSES	
Grants	208,470
Fund expense & program services	830,604
Administrative expenses	174,587
TOTAL GRANTS & OTHER EXPENSES	1,213,661

CHANGE IN NET ASSETS	514,593
NET ASSETS, BEGINNING 2014	1,083,055
NET ASSETS, END OF 2014	1,597,648

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.

STAFF & VOLUNTEER LEADERSHIP

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Yana Jacobs, LMFT
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Jessica Pratt
Data & Communications Manager



Malea Vedack
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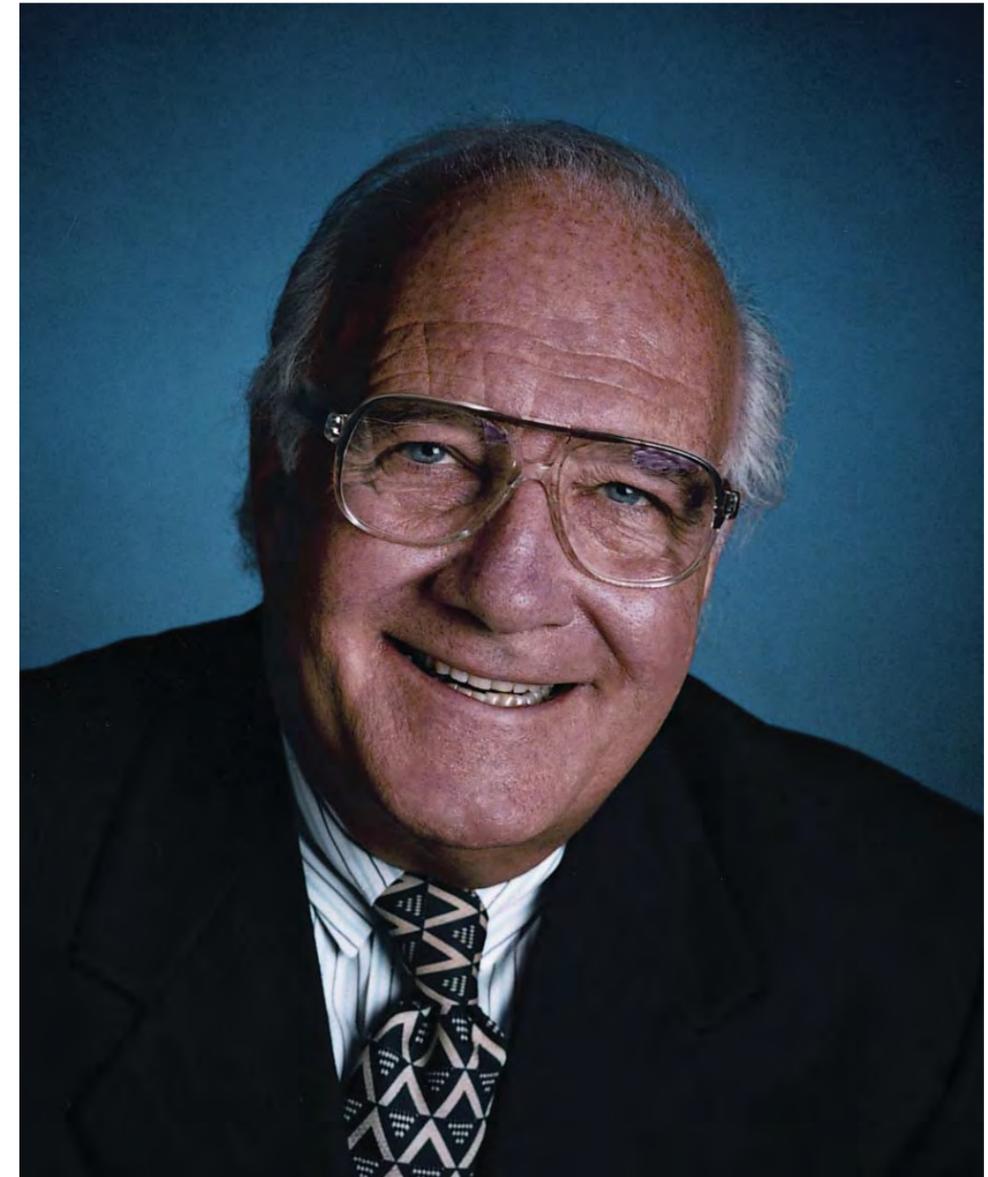
Paul J. Fink, MD
June 26, 1933 - June 4, 2014

Paul J. Fink was a local and national leader whose compassion and dedicated service to young people and families leave an immeasurable impact on the world. He was a founding member of the Dorothea Dix Think Tank, a donor-advised fund at *Excellence* begun by his colleague Dr. Dean Brooks to divert people with mental health challenges from the justice system to healing care. Dr. Fink later opened his own donor-advised fund at *Excellence* to support the Transformation Project, a mentoring and education program for at-risk street youth in Philadelphia with the goal of keeping young people alive, well and out of prison. In 2014, the Paul J. Fink Fund granted over \$10,000 to the Philadelphia nonprofit Institute for the Development of African American Youth.

Dr. Fink was a Professor of Psychiatry at Temple University School of Medicine and Chairman of the American Psychiatric Association's Task Force on Psychiatric Aspects of Violence. He was considered an expert in program development and enhancement. Dr. Fink served as the president of numerous organizations including the American Psychiatric Association (APA), the American College of Psychiatrists, the National Association for Psychiatric Healthcare Systems, the Philadelphia County Medical Society, and the American Association of Chairmen of Departments of Psychiatry. He served as both Chairman of the Department of Psychiatry at Albert Einstein Medical Center and Associate Vice President of the Albert Einstein Healthcare Network. He founded and directed the Einstein Center for the Study of Violence and was a co-founder and past president of the Greater Philadelphia Health Care Congress.

Dr. Fink founded, served and led numerous local Philadelphia committees tackling the issues surrounding youth violence.

Dr. Fink was a prolific author of over 190 articles. Among his national awards were the APA's Vestermark Award and the Francis J. Braceland Award for Public Service. In 1999, the Philadelphia County Medical Society selected Dr. Fink as Physician of the Year.



EXCELLENCE STAFF

Gina Firman Nikkel, PhD

President & CEO

gina@mentalhealthexcellence.org

503.930.0349

Yana Jacobs, MFT

Senior Program Officer

yana@mentalhealthexcellence.org

831.345.2280

Jessica Pratt

Data & Communications Manager

jessica@mentalhealthexcellence.org

503.515.6884

Malea Vedack

Chief Administrative Officer

malea@mentalhealthexcellence.org

503.841.1020

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