



# BUILDING COMMUNITY

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2018 ANNUAL REPORT



**PENN FOUNDATION**  
BEHAVIORAL HEALTH SERVICES





## Message from the Board Chair and the President and CEO

At Penn Foundation's Autumn Event last fall, keynote speaker Ron Suskind told the story of his family's journey raising and connecting to their autistic son, Owen. Mr. Suskind shared that they learned that they didn't have to change Owen; their work was to change the world to "make room" for Owen and others like him.

Building a community that "makes room" for the individuals we serve has always been part of our mission. This past year, we worked diligently to build community by offering innovative, responsive care; creating a welcoming, safe community among our clients and residents that supports their journeys of change and recovery; being responsible stewards of the generous gifts and resources that we have been given; and participating in community events and supporting partner organizations. The stories you will read in this Annual Report describe the innovative ways we are putting the principle of building community into practice.

We are pleased to welcome Elise Lamarra, MS, RN, to our Board of Directors. Elise is

the Chief Operating Officer of Friends Life Care Partners and has more than 30 years of clinical, administrative, and managerial experience in acute care, home health care, hospice care, and managed care. Elise possesses a passion and a vision for helping those in our community living with behavioral health challenges.

We were also saddened to lose a member of our community with the passing of Board member Wanda Lindsay in July. Wanda joined the Penn Foundation Board of Directors in 2002 and also served on the Penn Gardens Board of Directors. She was a passionate advocate for mental health; her energy and spirit will be missed.

As we look toward the future, demand for our services has never been greater. We are both challenged and inspired by this reality. We are committed to providing high-quality, innovative, accessible mental health and substance abuse treatment services for our community. We will continue to think creatively about the services we provide and forge new partnerships that challenge traditional service delivery. Above all, we

will stay true to our mission of instilling hope, inspiring change, and building community for the more than 17,000 individuals who trust us to share in their journey each year. ♦

Margaret Zook  
Chair, Board of Directors

Wayne Mugrauer  
President & CEO





## Harnessing the Power of Innovative Partnerships to Promote Recovery

In 2017, Penn Foundation was designated by Aetna as an Institute of Quality® for Behavioral Health-Substance Abuse for exemplifying excellence in care, a commitment to continuous improvement, meeting certain standards of quality, and cost-efficiency.

“Penn Foundation has always strived to provide the best practices in addiction medicine in response to the community’s needs,” says Julie Williams, MA, LPC, Penn Foundation Director of Clinical Services. “Being named an Aetna Institute of Quality® affirms our commitment to providing high-quality care and assures those seeking treatment that Penn Foundation will provide innovative addiction care that will support them into a life of recovery.”

Penn Foundation has continually worked to establish innovative partnerships that help individuals achieve and maintain their recovery. One such partnership is a care coordination project with Aetna. Through

this unique program, Penn Foundation’s Peer Support Team Leader, Ryan Schweiger, CPS, CRS, CPRP, provides engagement and peer support to Recovery Center inpatient clients with Aetna insurance. Ryan works closely with the inpatient addiction counselors and an Aetna member advocate to coordinate aftercare and provide resources to individuals and their families.

“This program is really designed to help individuals achieve and maintain their recovery,” says Ryan. “By establishing a rapport with clients while they’re in treatment, I am able to be a trusted support to them post-treatment. I’m able to connect them to resources and others in recovery that will help propel their recovery forward.” ♦

## Dan’s Story

In May, Dan came to Penn Foundation’s inpatient rehab program. This was his third time in an inpatient facility but his first time at Penn Foundation. Dan felt like he had hit rock bottom – physically and mentally – and could no longer handle the destructive lifestyle that his addiction had created.

Within the first week of his stay, Dan’s counselor mentioned the care coordination program available to Aetna members, and he was immediately interested. “I had been doing things my way for so long, but my way wasn’t working,” said Dan. “I had to try a different way.”

Through the care coordination program, Dan was connected with Ryan Schweiger, Peer Support Team Leader, who helped Dan access resources that would support his recovery and prepare him for life after completing inpatient treatment. This included registering for the Montgomery County CSP (Community Support Program) Conference, which Dan attended two weeks after discharge, and enrolling in the POWER (Partnership on Work Enrichment and Readiness) program at Montgomery County



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Community College, which Dan started this fall. “On the day I was discharged, I was having car problems. So, Ryan gave me a ride home,” recalls Dan. “When we got there, Ryan helped me jump my car and fix the tire. It was a small thing, but he

understood how stressful the first day out of treatment could be and wanted to make sure I had a solid start to my recovery so that I can continue to move forward.” ♦



# Fostering Access to Substance Abuse Treatment to Help Keep Families Intact

Penn Foundation has partnered with Bucks County Children and Youth Social Services to embed Mobile Engagement Specialists (MES) side by side with Children and Youth caseworkers in the homes of clients served by the agency. This collaboration aims to reduce out-of-home placements for children, reduce the number of Children and Youth cases opened, and eliminate the wait time for a drug and alcohol assessment, allowing quicker access to treatment.

Over the past year, MES has worked with 80 individuals and their families. Of those, 30 cases involved a newborn diagnosed with substance exposure at birth per the requirements of hospitals to report babies that fall under the criteria mandated in the Child Abuse Prevention and Treatment Act (CAPTA). Eighty-three percent of the individuals identified through CAPTA are involved in addiction treatment, and in 90%

of the CAPTA cases, MES workers were able to engage in treatment other household members who also had an addiction.

“With an embedded Mobile Engagement Specialist as part of the team, the individual struggling with addiction is able to receive immediate outreach and support with getting into treatment, thereby reducing the likelihood of out-of-home placement being necessary,” says Gordon Hornig, MSW, LSW, Director of Mobile Engagement Services at Penn Foundation. “Also, research has shown that family involvement in intervention and treatment increases the likelihood of the individuals achieving and maintaining recovery.”

Thanks to this innovative partnership, 46 individuals received the treatment and support they needed to start their recovery journeys and keep their families intact. ♦



MES has worked with 80 individuals and their families.



46 individuals received treatment and support.

## Penny's Story

Penny has battled mental health and substance use issues since she was a teen. In June 2017, she overdosed on heroin twice and was revived by Narcan both times. “I should not be alive,” she says.

After her second overdose, Bucks County Children and Youth connected Penny to Penn Foundation's Center of Excellence Program, a decision that she was reluctant about at first but one she says ultimately saved her life. The COE team supported Penny as she completed the Intensive Outpatient Program (IOP). The team takes her to medical appointments and is helping her find a job and a place to live. Her ultimate goal is to regain custody of her children.

“Penn Foundation is my family,” says Penny. “I can call my counselors at any time, about anything, and they don't judge me. And they reach out to me, asking about me and my kids. I'm angry at myself for what I've done, but I'm not ashamed anymore. I just want a life. I want my kids back. And thanks to the COE team, I believe that it is possible.” ♦

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## Team Approach Keeps Individuals in Their Communities and Out of the Hospital



Assertive Community Treatment (ACT) is a person-centered approach to care that blends the disciplines of psychiatry, psychology, nursing, addictions, social work, and psychosocial rehabilitation to offer a multidisciplinary team of professionals who work together to provide highly individualized treatment, rehabilitation, and support services in individuals' homes and communities.

A Forensics ACT team takes this approach one step further by also including a Forensics Specialist whose primary role is to advocate for individuals as they move through the criminal justice system. The Forensics Specialist also serves as the team's liaison with the judicial system.

Services are provided 24 hours a day, 7 days a week with the goal of lessening or eliminating symptoms of mental illness; minimizing or preventing recurrent episodes of illness; enhancing an individual's ability to live independently within his or her own community; and lessening the family's burden of providing care.

Penn Foundation's FACT team in Sellersville has its highest census ever and has one of the lowest hospitalization rates of all ACT teams in Bucks and Montgomery counties. "Treating the neediest of individuals and keeping them out of the hospital is our job, and we have been accomplishing that goal," says Lori Huey, MA, LPC, FACT Team Leader. ♦

## Denise's Story

Denise is a mother who has long struggled with bipolar disorder and substance use. She has been hospitalized multiple times due to severe psychotic and delusional symptoms. She refused to take medication and was unable to manage her symptoms in outpatient treatment. This resulted in the loss of her job, her apartment, and custody of her son. Her high-risk behaviors also led to legal charges.

In 2016, Denise found herself in the hospital once again, and her mother called Penn Foundation. She was connected with the FACT team, which she describes as "exactly what I needed." With the team's help, Denise began to accept that she had a mental illness. The team helped Denise find housing, apply for food stamps, access legal services, and address her mental and physical health issues. The team also taught Denise how to cook and make a budget. She now works part-time and has a better relationship with her parents and son.

"I didn't feel right for a long time, but the FACT team helped me to feel like myself again," says Denise. "I have this group of people that I can trust and depend on. And most importantly, thanks to the team, I am able to be part of my family again." ♦

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# Penn Foundation Growing to Meet Community Need

As the number of individuals seeking substance abuse treatment grows, Penn Foundation has remained committed to providing the most up-to-date, innovative, and evidence-based addiction medicine available and ensuring that it is accessible to our community.

As a result, Penn Foundation expanded its licensure to serve an additional 300 individuals in our community and opened two new offices: one in Colmar and one in Sellersville.

Opened in July 2018, the 2,150-square-foot office in Colmar provides drug and alcohol assessments, outpatient counseling, intensive outpatient services, and medication-assisted treatment. In the first week alone, 25 individuals were taken off a waitlist and received care.

Opened in September 2018, the 6,000-square-foot office in Sellersville, located adjacent to the main Penn Foundation

campus, includes two floors. The first floor is clinical space for an alcohol-specific outpatient treatment program and the second floor is administrative space that has helped to relieve space constraints throughout the main campus.

“By opening these two new locations, Penn Foundation is better poised to meet the growing community need for addiction services,” says Christopher Squillaro, DO. “And by developing an alcohol-specific treatment program, we are able to offer distinct services designed to address the unique needs of this population, which are usually very different than those struggling with an opioid addiction. This will result in a better experience, and better outcomes, for both populations.” ♦



Penn Foundation provides innovative addiction medicine.



Penn Foundation expanded its licensure to serve an additional 300 individuals.



Sellersville office opened in September 2018.



Colmar office opened in July 2018.

Left to right: Trish Nye, Outpatient Drug and Alcohol Counselor, Colmar office; Theresa Benonis, Director of Outpatient Drug and Alcohol Services; and Renee Dwornitski, Clinical Supervisor of Outpatient Drug and Alcohol Services, Colmar office.





## Integrating Behavioral Health into Primary Care

For the past year, Penn Foundation has been collaborating with Family Practice Associates of Upper Dublin (FPUD) to offer behavioral health integration at FPUD's Fort Washington-based primary care practice. This warm handoff model of care offers FPUD's patients immediate access to an on-site behavioral health professional who can provide assessments, short-term interventions, access to psychiatric consultations, and referrals to behavioral health treatment if needed.

"We are happy to be partnering with FPUD to offer integrated healthcare services," says Maureen Gingerich, MPH, MSW, LCSW, Director of Integrated Health Services at Penn Foundation. "Penn Foundation and FPUD share a strong commitment to treating the whole person. By providing FPUD's patients with immediate access to behavioral healthcare, we are increasing the likelihood that the patient will access and follow through with necessary treatment, ultimately resulting in a better quality of life for the patient."

"Offering holistic, coordinated, comprehensive care has always been a hallmark of our practice," says Cassandra J. Liu, MD. "By integrating behavioral health into our practice, we are allowing our patients to address their medical conditions and behavioral health concerns together in one setting, thus ensuring high quality and continuity of care. We are pleased to partner with an organization like Penn Foundation that shares these values." ♦

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**Offering holistic, coordinated, comprehensive care has always been a hallmark of our practice.**

– Cassandra J. Liu, MD



Left to right: Jacquelyn Landolfi, MBA, BSN, RN (FPUD), Virginia Byers, CRNP (FPUD), Cassandra J. Liu, MD (FPUD), and Maureen Gingerich, MPH, LCSW (Penn Foundation).



# Preparing Tomorrow's Leaders Today

Penn Foundation has long been committed to providing educational learning opportunities for its staff as well as college students considering careers in human services. Through its Leadership Institute, internship opportunities, and a new academic affiliation, Penn Foundation is paving the way for skill building, field experience, and career growth.

This past year, the Leadership Institute graduated its second class, which included 7 mid-level managers from Penn Foundation and 5 from Grand View Health. Facilitated by Nancy Aronson, PhD, a faculty member of the Philadelphia College of Osteopathic Medicine, and Karen Kern, MSW, LCSW, Penn Foundation Vice President of Education and Training, the Leadership Institute is an annual program designed to foster an understanding of leadership and an enhanced sense of teamwork among a multidisciplinary group of staff. The program has already exceeded its goal of decreasing staff turnover by 4% over three years; in just two years, staff turnover has decreased 5%.

Penn Foundation offers internship opportunities in many of its programs.

In particular, the agency has partnered with Philadelphia University to offer field experiences for its Occupational Therapy students. Students gain experience in the psychiatric rehabilitation program REACH and the residential program Penn Villa. OT interns assist with REACH groups and classes and meet one-on-one with program participants. At Penn Villa, they teach coping skills and problem-solving skills and assist residents with daily living skills such as meal preparation and nutrition.

Penn Foundation has established a teaching affiliation with Thomas Jefferson University. Through this innovative partnership, Penn Foundation educates medical students at the university's Sidney Kimmel Medical College and also offers a psychiatric residency program. Chief Resident Dr. Dan Neff says, "This was my first experience in a nonurban setting, and it exceeded all of my expectations. Penn Foundation has tremendous programs and has found truly creative ways to partner with the community. We definitely need to continue sending our students here." ♦



35 mid-level managers completed the Leadership Institute.



15 Occupational Therapy interns.



12 Thomas Jefferson University psychiatric residents.

Deans from Jefferson's Sidney Kimmel Medical College toured Penn Foundation in March. Pictured are (left to right, standing) Wayne Mugrauer, Penn Foundation President & CEO; Mitchell Cohen, MD, Vice Chair of Education, Department of Psychiatry and Human Behavior; Kenneth Certa, MD, Associate Professor, Psychiatry and Human Behavior; Omair Abbasi, MD, Clinical Assistant Professor, Psychiatry and Human Behavior; Christopher Squillaro, DO, Penn Foundation Medical Director; (sitting) Jaynie Estrada, MEd, Education Program Administrator; Nicole Whitaker, MS, Adult Residency Program Coordinator; and Ariela Green, MD, Resident in Psychiatry, Jefferson.





## Autumn Event Keynote Speaker Ron Suskind Encourages Audience to Embrace Their Inner Heroes

Penn Foundation's caring community came together on September 26, 2017, for our 15th annual Autumn Event featuring Pulitzer Prize-winning journalist and best-selling author Ron Suskind. Ron candidly shared his family's journey raising and connecting with their autistic son, Owen. He captivated the audience with his humor, honesty, and passionate storytelling, reminding all of us that we are the heroes of our own stories.


For the first time, we celebrated a family – The Hunsbergers: Steven, Charlotte, Colin, Ian, and Lily – with our 14th annual Adventures in Excellence Award. This award recognized the Hunsbergers' integrity, commitment to excellence, and active volunteer service with numerous community organizations.

We were also pleased to present Sandy Landis, Penn Foundation's Director of Human Resources (retired), with the 4th annual Vernon H. Kratz, MD,


Penn Foundation Service Award. Throughout a remarkable career that spanned 47 years, Sandy Landis demonstrated incredible integrity, compassion, and dedication to Penn Foundation's mission and particularly our staff, knowing firsthand the challenges and importance of their work.

We were delighted to welcome Richard Curtis, Souderton Area High School teacher and winner of the *Live with Kelly* co-host contest, as our emcee this year. His friendly, energetic personality engaged the audience.

This special evening raised over \$170,000 for Penn Foundation, which supports our ability to provide the clinical programs and care upon which our community depends. ♦



Ron Suskind talks about his family's journey raising a son with autism.



Dr. Un talks about the importance of caring for our customers.

## Hyong Un, MD, Chief Psychiatric Officer for Aetna, Speaks at Penn Foundation

Hyong Un, MD, Chief Psychiatric Officer for Aetna, spoke at Penn Foundation in May as part of the Dr. Michael A. Peters Lecture Series.

Dr. Un has been with Aetna since 2002 and supports the development of behavioral healthcare strategy as well as the development of innovative behavioral health disease and care management programs that promote overall optimal health and integration of behavioral health with medical management.

Dr. Un's informative presentation, *Disruptive Innovation: Transforming the Consumer Healthcare Experience*, focused on the importance of caring for our customers and providing accessible, quality health care "in a way that is simple, personal, and convenient." ♦



# Philanthropy in Action

In 2017-18, Penn Foundation received grants and major corporate sponsorships from the following entities, which help advance our mission of care:

- ◆ An anonymous family foundation
  - ◆ Bergey’s, Inc.
  - ◆ Bucks County Drug and Alcohol Commission, Inc.
  - ◆ Clemens Family Corporation
  - ◆ The Connelly Foundation
  - ◆ Enterprise Holdings Foundation
- ◆ Foundations Community Partnership
  - ◆ Harleysville Bank
  - ◆ HealthSpark Foundation
  - ◆ Lacher
  - ◆ La-Mel Garden Fund of the Bucks County Foundation
  - ◆ Landis, Hunsberger, Gingrich & Weik, LLP
- ◆ The Moyer Foundation
  - ◆ PCPA Workers’ Comp Trust
  - ◆ Penn Community Bank Foundation
  - ◆ The Pew Charitable Trusts
  - ◆ QNB
  - ◆ Sellersville Pharmacy
  - ◆ Telford Area Community Aid Foundation
- ◆ Today, Inc.
  - ◆ Univest Corporation of Pennsylvania
  - ◆ VNA Foundation of Greater North Penn
  - ◆ Wells Fargo Foundation

We are grateful to these organizations and to the individuals and families who have supported Penn Foundation with charitable gifts this year.

## Extraordinary Care Starts with Extraordinary Generosity

Penn Foundation has been bringing Hope Within Reach to those in our community seeking mental health and addiction treatment for 63 years. And we have always been able to rely on our caring community to help us create a place of hope and healing.

The national opioid epidemic and its impact on our community have significantly increased demand for Penn Foundation’s Recovery Center services. New programs, staff, and clients require additional space. Penn Foundation has purchased and renovated a 6,000-square-foot office building contiguous to our 30-acre Sellersville campus.



### Join Us on This Next Step in Our History

We ask our community to invest in our Hope Within Reach Campaign, which will allow us to remain responsive to community need and expand our capacity to serve the individuals and families who rely on Penn Foundation.

To learn more, visit our website:  
**[PennFoundation.org/How-You-Can-Help/HopeWithinReach](http://PennFoundation.org/How-You-Can-Help/HopeWithinReach)**.

# Statement of Activities

For the Year Ended June 30, 2018

## REVENUE, GAINS, AND OTHER SUPPORT:

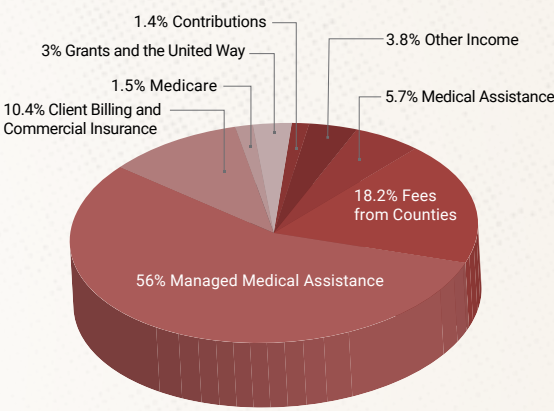
Managed Medical Assistance	\$ 14,787,018
Fees from Counties	\$ 4,798,925
Client Billing and Commercial Insurance	\$ 2,756,314
Medical Assistance	\$ 1,504,422
Other Income	\$ 999,468
Grants and the United Way	\$ 799,776
Medicare	\$ 399,161
Contributions	\$ 358,101
TOTAL	\$ 26, 403,185

## EXPENDITURES AND LOSSES:

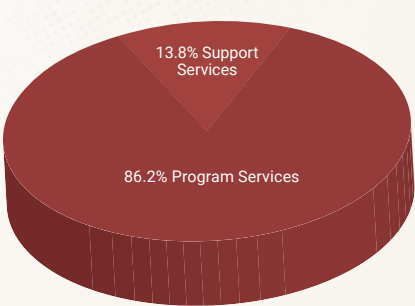
Program Services	\$ 22,657,755
Support Services	\$ 3,614,957
TOTAL	\$ 26,272,712
Change in Net Assets	\$ 130,473

**Unaudited Statement**  
*The information included in this statement is unaudited.*

## REVENUE, GAINS, AND OTHER SUPPORT



## EXPENDITURES AND LOSSES



## LICENSURE

Pennsylvania Department of Human Services

## ACCREDITATIONS

- Association for Clinical Pastoral Education Inc.
- Commission on Accreditation of Rehabilitation Facilities\*
- Clubhouse International

## MEMBERSHIPS

- American Psychiatric Association
- Bucks-Mont Collaborative
- Franconia Mennonite Conference – Conference Related Ministry
- Mennonite Health Services
- National Alliance on Mental Illness
- National Association of Addiction Treatment Providers
- National Council for Behavioral Health
- Pennsylvania Association of Psychiatric Rehabilitation Services
- Rehabilitation and Community Providers Association

\* Alcohol and Other Drug Addiction Detoxification Program and Inpatient Treatment Program





**PENN FOUNDATION**  
BEHAVIORAL HEALTH SERVICES

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