

Awaken Our Imaginations

60 YEARS OF INSTILLING HOPE, INSPIRING CHANGE,
AND BUILDING COMMUNITY



PENN FOUNDATION
BEHAVIORAL HEALTH SERVICES

'14 – '15 ANNUAL REPORT



Wayne A. Mugrauer & Margaret K. Zook

MESSAGE FROM THE BOARD CHAIR AND THE PRESIDENT & CEO

"Awaken our imaginations," a favorite phrase of Penn Foundation Senior Psychiatrist Vernon Kratz, MD, is a fitting description of the 2014-2015 fiscal year, which was characterized by both opportunities and challenges as we continued to make progress toward our strategic goal of becoming a fully integrated, holistically-focused healthcare organization.

At its annual retreat in March, the Board of Directors revisited the most important strategic questions and issues facing our organization. Anthony Coletta, MD, MBA, President and CEO of Tandigm Health, gave an insightful and timely keynote presentation about healthcare in America today.

In May, we began implementation of our new Electronic Health Records (EHR) system, PsychConsult® Provider. This system allows us to centralize and more easily share information, resulting in more coordinated, efficient care for our clients.

There have been a number of leadership changes at Penn Foundation this year, including the retirements of Chief Financial Officer Francine Mellott and Vice President Tom Tantillo, and Vice President Donna Duffy-Bell accepting the position of Administrator of the Bucks County Department of Mental Health/Developmental Programs. We are very pleased to welcome Kellie O'Neill, CPA, MBA as our new Chief Financial Officer and Gibson George, MD as an Addiction Psychiatrist at the Recovery Center.

"As we look toward the next 60 years, Penn Foundation is committed to continuing its legacy of clinical excellence and innovative care."

In June, more than 300 people came to our campus for "Food for Thought," celebrating Penn Foundation's 60th anniversary with a variety of food trucks and classic cars representing the past six decades – a wonderful tribute to the transformative work that takes place at Penn Foundation.

As we look toward the next 60 years, Penn Foundation is committed to continuing its legacy of clinical excellence and innovative care. We will think creatively about the services we provide and the most accessible and effective ways to offer them. We hope to pilot new and innovative partnerships and services that will fundamentally change the way our care is provided. Above all, we will stay true to our mission of instilling hope, inspiring change, and building community for the more than 10,000 individuals who trust us to share in their journey each year.

Margaret K. Zook | Board Chair

Wayne A. Mugrauer | President & CEO

PENN FOUNDATION PUTS GRANTS INTO ACTION FOR INNOVATIVE CARE AND COMMUNITY PROGRAMS

During the 2014-2015 fiscal year, Penn Foundation continued its tradition of piloting innovative care approaches and responding to community need by implementing these three grants:

- ❖ A **North Penn Community Health Foundation** grant is enabling Penn Foundation to organize an integrated team of physical and behavioral healthcare representatives to research and design a pilot program for hospital discharge planning and care coordination. The collaboration with Grand View Health supports older adults with dual eligibility for Medicare and Medicaid, and who have multiple chronic conditions that are influenced by behavioral health conditions, transition from inpatient care to the community.
- ❖ More than 50 individuals are benefiting from a **Pew Charitable Trusts** grant enabling Wellspring Clubhouse to provide Mobile Psychiatric Rehabilitation (MPR) and Cognitive Remediation Therapy (CRT) for individuals living with mental illness. "It's exciting to provide these two much-needed interventions which are having a real impact on individuals' lives," says Renee Dwornitski, MPR Specialist and CRT Team Leader. "MPR participants have successfully started working, volunteering, improving their living conditions, and managing anxiety symptoms. CRT participants have demonstrated increases in memory and concentration, frustration tolerance, confidence, and computer skills."
- ❖ A **Bucks County Drug and Alcohol Commission** grant supports Penn Foundation's work with local school districts, clergy, physicians, and the community to provide substance abuse awareness, prevention, intervention, and education.



“

This program has changed my life.

Patti's Story

Patti's struggle with bipolar disorder, combined with her medical challenges including diabetes, congestive heart failure, and renal disease, led her to a suicide attempt. Then, Patti enrolled in HealthConnections and, with the support of a Nurse Navigator, reconnected with services for her mental and physical health needs.

"Patti has grown to the point where she is advocating for herself and coordinating her own appointments," says Patti's Nurse Navigator. "She has a broader insight into her feelings and symptoms, recognizes what is needed to cope with her depressive episodes, and communicates her needs."

"Before HealthConnections, I thought no one cared about me," says Patti. "Now I have a team of people to call when I need help. HealthConnections has taught me how to better care for myself and how to communicate more openly and honestly. This program has changed my life." 📺



“
I am so grateful
for FACT.”

Jared's Story

Jared first tried drugs in the sixth grade, started using marijuana in the 10th grade, and in his early 20s, experimented with cocaine. He also struggled with schizoaffective disorder. Jared's unstable mental, emotional, and physical health led to violent episodes, suicide attempts, and multiple lengthy hospitalizations.

In 2012, he was referred to the FACT (Forensic Assertive Community Treatment) program, which, according to Jared, saved his life. Jared has learned coping skills to manage his mental health symptoms and has developed relapse prevention plans for his substance abuse recovery. FACT team members have accompanied him to medical appointments, arranged transportation, and offered support with housing issues.

"Jared has engaged in treatment wholeheartedly," says Alexandra Bustelo, Lead Clinician on the FACT team. "He's always willing to try something new that may help him make positive changes and improve his quality of life."

"I am so grateful for FACT," says Jared. "The team has taught me how to make healthy choices and take care of myself. I would be lost without it." 🇺🇸

FACT'S TEAM APPROACH PROVIDES CLIENTS WITH COMPREHENSIVE CARE

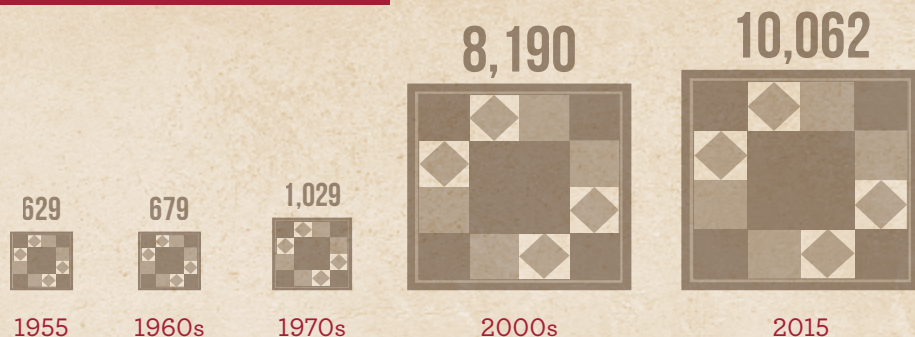
Because of FACT's (Forensic Assertive Community Treatment) highly individualized and multidisciplinary approach to care, there's no typical day for the 18-member FACT team. Every team member works with every client – adults living with mental illness who may have been hospitalized multiple times or may have come from the criminal justice system. Although each team member has a specialty such as psychiatry, nursing, mental health, addiction, employment, or housing, they are cross-trained to provide any FACT service.

Team members visit each of their 90 clients three times per week – sometimes twice a day – and have daily meetings to review what has happened with each client in the past 24 hours and to assess the client's needs for the next day. This comprehensive team approach makes FACT a unique program.

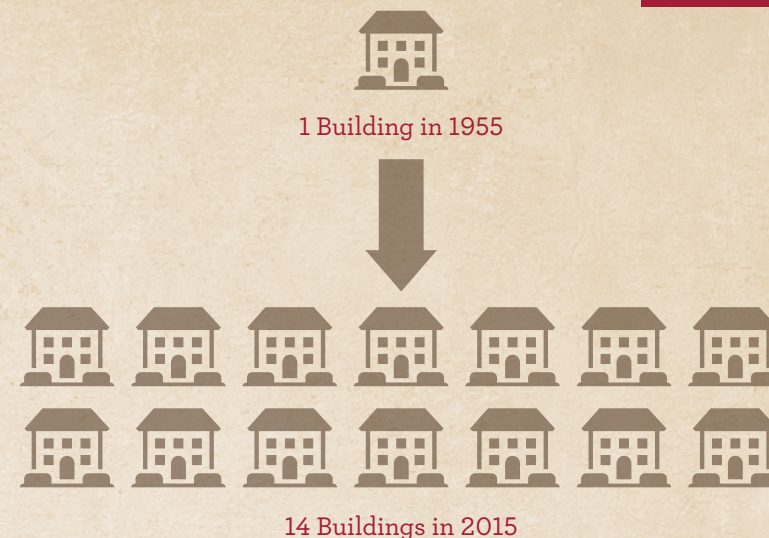
"It is very rewarding to help individuals stay out of the hospital or jail and see them make progress toward a healthier lifestyle."

"FACT allows clients to receive all aspects of their care in one place from one team of providers," says Deborah Strouse, FACT Team Leader. "There are no caseloads because everyone on the team, including the doctor, works with every client to provide support and rehabilitation in the client's home and community. It's very rewarding to help individuals stay out of the hospital or jail and see them make progress toward a healthier lifestyle."

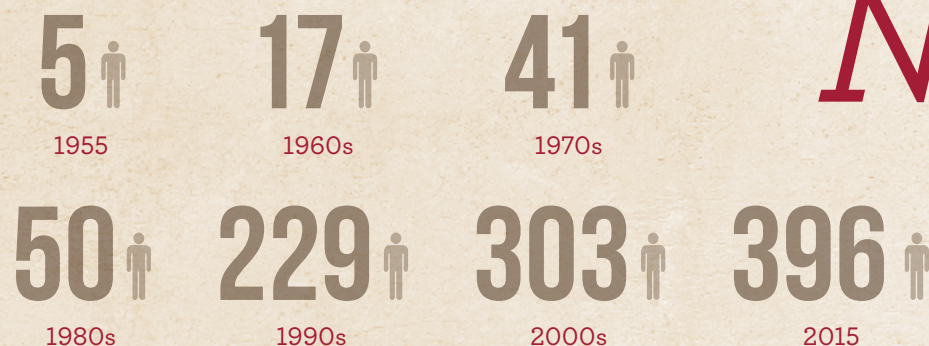
NUMBER OF PEOPLE SERVED



INFRASTRUCTURE



NUMBER OF STAFF



PENN FOUNDATION

By the Numbers

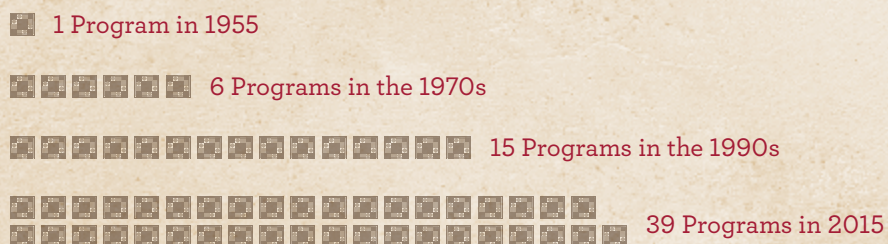
1955 – 2015

BUDGET AMOUNT

In 1954, Dr. Norman L. Loux's visionary approach to community-based psychiatric care transformed the mental health system. The Penn Foundation for Mental Health became a model for community mental health centers across the nation.

As Penn Foundation embarks on its next 60 years, embracing new partnerships and collaborations, President & CEO Wayne Mugarauer says its leadership will continue to think creatively about how to make programs more accessible and effective.

PROGRAMS THAT HAVE BEEN INSTITUTED



\$
\$20,500 in 1955

\$
\$22,872,952 in 2015

FINDING PURPOSE AND SELF-WORTH THROUGH MEANINGFUL ROLES

Earlier this year, Penn Foundation celebrated helping over 80 Wellspring Clubhouse members – adults living with mental illness – with their employment, educational, and volunteer goals. Working, going to school, or volunteering are typical activities for most people, but for people living with mental illness, they are remarkable accomplishments.

"Most people associate their identity with a social role – employee, student, volunteer," explains Jill Horan, Director of Wellspring Clubhouse. "For people living with mental illness, finding this identity can be challenging. In addition to the typical hurdles people face when job searching, working, or applying to or attending school, those with mental illness also struggle with the symptoms of their illness and the ups and downs that come with them."

"People living with mental illness want to identify as something bigger than their illness."

Through REACH and Wellspring Clubhouse, individuals receive support in identifying and achieving meaningful life roles. These programs prepare individuals to work on their chosen goal, guide them through the process of achieving their goal, and support them in maintaining their success.

"People living with mental illness want to identify as something bigger than their illness," says Horan. "The intrinsic value of work and school increases for these individuals because they can identify as a 'worker' or 'student' rather than a 'patient' or someone who is 'mentally ill'. The attachment to a valued social role provides self-worth, confidence, and purpose."



"The coping skills that I learned through REACH have helped me in all aspects of my life."

Lisa's Story

At age 15, struggling with depression and cutting, Lisa started using marijuana as a way to feel better about herself. "I was hooked immediately," remembers Lisa. "My drug use quickly escalated from there."

In 2008, Lisa enrolled at a community college but continued to use drugs and dropped out in 2010. After two more years of what she calls "wild" drug use, Lisa moved into Penn Foundation's Village of Hope.

While there, Lisa was connected with the REACH program, which helps individuals with behavioral health issues identify and achieve life goals. Lisa knew she wanted to be a student again but was anxious because it had been 14 years since she went to school drug-free. But with the support of REACH, she addressed those fears and is once again a college student.

"I had a lot of anxiety about returning to a classroom setting," Lisa says. "But REACH helped me to feel secure enough in myself to do it. The coping skills that I learned through REACH have helped me in all aspects of my life." 📖



“
My experiences with
the CPE program and
Wellspring Clubhouse
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and will definitely make
me a better pastor.”

CPE intern Brian (right) used his culinary background to help Clubhouse members develop their kitchen skills.

Brian's Story

As a restaurateur and executive chef, ministry was not something Brian thought about. “But co-workers would tell me, ‘You should be a pastor,’” he says. “After hearing it so many times, I finally accepted my calling.”

As a student at the Lutheran Theological Seminary in Philadelphia, Brian enrolled in Penn Foundation's Clinical Pastoral Education (CPE) program to develop his understanding of people with mental health issues. Brian served at Wellspring Clubhouse, teaching healthy cooking and kitchen skills to members of the Health and Wellness Unit.

“I learned that my preconceived notions can be a huge barrier in gaining trust in relationships,” says Brian. “Luckily, my first day at the Clubhouse forced me to confront that barrier and remove it simply by accepting others as they accepted me. My experiences with the CPE program and Wellspring Clubhouse will stay in my heart and will definitely make me a better pastor.”

PENN FOUNDATION HELPS PREPARE STUDENTS FOR THEIR PROFESSIONS

Over the past year, more than 25 students gained hands-on experience in Penn Foundation programs. “Penn Foundation's wide variety of clinical programs offer students diverse opportunities to explore their interests and abilities, develop skills, and make connections,” says Sandy Landis, Director of Human Resources.

“*This partnership has given our students a great opportunity for connection, practice, networking, and skill development.*”

Philadelphia University Occupational Therapy students worked with Wellspring Clubhouse members and Penn Villa residents to develop their skills and understanding of mental health issues.

“When I first came to Wellspring Clubhouse, I had no idea what my role would be,” says student Sykema Rodrigues. “But I quickly learned that the origins of occupational therapy are rooted in mental health. Occupational therapy helps individuals live independently within a community and engage in meaningful life roles.”

In partnership with The Moyer Foundation, Arcadia University International Peace and Conflict Resolution (IPCR) students developed and implemented a three-session conflict resolution program at Camp Mariposa®. The students worked with the campers on team building activities and taught them about communication skills, including body language.

“This partnership has given our students a great opportunity for connection, practice, networking, and skill development,” says Amy Cox, Assistant Professor and Director of the IPCR program at Arcadia University.



Singer Judy Collins (standing, second from right) toured Penn Foundation prior to her powerful presentation at the Autumn Event fundraiser. With her are (left to right) Vernon Kratz, MD, Penn Foundation Service Award Recipient; Margaret Zook, Chair, Penn Foundation Board of Directors; Wayne Mugrauer, Penn Foundation President & CEO; Thomas Leidy, Vice Chair, Penn Foundation Board of Directors; and Sanford Alderfer, Adventures in Excellence Award Recipient.

SINGER JUDY COLLINS DELIVERS A MESSAGE OF HOPE AT THE AUTUMN EVENT FUNDRAISER

At Penn Foundation's 2014 Autumn Event fundraiser, legendary singer Judy Collins spoke candidly about her struggles with depression and alcoholism, the loss of her son to suicide, and the important role therapy played in her healing. "Get a support system around you," she said. "Find people who will listen to you and talk as much and as long as you want."

The Autumn Event raised more than \$144,000 to support Penn Foundation's ability to provide high quality clinical programs and care, and a silent auction raised \$12,000 for Camp Courage, Penn Foundation's summer camp program for children with mental or developmental disorders. 6abc Action News Anchor Eva Pilgrim returned as emcee for the evening. Vernon Kratz, MD, Senior Psychiatrist, received the inaugural Penn Foundation Service Award to honor his 40 years of service to Penn Foundation. Sanford A. Alderfer, founder of Sanford Alderfer Companies, received the Adventures in Excellence Award to recognize his community leadership and service.

VERNON KRATZ, MD, RECEIVES PENN FOUNDATION SERVICE AWARD FOR HIS LEADERSHIP AND SERVICE

Penn Foundation's founder Norman L. Loux, MD, believed in the value of having "staff who are dedicated to common principles, who are alert, imaginative, and willing to work hard to translate their interests and visions into action and reality." In that spirit, Senior Psychiatrist Vernon Kratz, MD, was the unanimous selection for the first Penn Foundation Service Award. Dr. Kratz has consistently demonstrated exceptional service, dedication, and leadership to the Penn Foundation community and especially to those who partnered with him on their recovery journey. Going forward, this award will be named in Dr. Kratz's honor.

Vernon Kratz, MD, (left) receives his award from Penn Foundation Board Member Ronald Souder, MD.





Penn Foundation Board

From left: Wanda Lindsay; J. Phillip Moyer, MD; H. Bruce Detweiler, CPA, Treasurer; Thomas Leidy, Vice Chair; Margaret Zook, Chair; Marvin Anders, Secretary; Vernon Kratz, MD; Donald Kraybill, PhD; Dorothy Weik, Esq.; Ronald Souder, MD; David Landis. Missing From Photo: Jeffrey Schweitzer.

JEFFREY BRENNER, MD, SPEAKS TO PENN FOUNDATION ABOUT INTEGRATED HEALTH CARE MODEL

In October, Jeffrey Brenner, MD, Founder and Executive Director of the Camden Coalition of Healthcare Providers, spoke at Penn Foundation about his innovative healthcare work in Camden, N.J.

A 2013 MacArthur Genius Grant recipient, Dr. Brenner created a comprehensive model of health care delivery that has been proven to lower healthcare costs, integrate care, and improve healthcare access. He is working with 14 communities across the country, including Allentown, to develop sustainable and accountable care systems based on the Camden model.

Dr. Brenner's visit was part of the Dr. Michael A. Peters Lecture Series, a community-based educational program that brings national experts on behavioral health to Penn Foundation. The series is named for Grand View Health's Chief of Medicine (1947-1972), who was instrumental to the formation of the Penn Foundation in 1955.



Jeffrey Brenner (center) with the Penn Foundation Leadership Team

From left: Marianne Gilson, Penn Foundation COO; Wayne Mugrauer, Penn Foundation President & CEO; Jeffrey Brenner, MD, Founder and Executive Director of the Camden Coalition of Healthcare Providers; Christopher Squillaro, DO, Penn Foundation Medical Director; and Margaret Zook, Chair, Penn Foundation Board of Directors.

HOW A VISIONARY BOARD OF DIRECTORS AND DEDICATED PSYCHIATRIST TRANSFORMED THE MENTAL HEALTH SYSTEM



In 1954, Norman L. Loux, MD, wrote a white paper describing his vision for a community-based psychiatric facility, a vision that reflected dramatic changes to the mental health care system. With the support of Penn Foundation's founding Board of Directors, The Penn Foundation for Mental Health was established and used as a national model for community-based mental health centers.

Sixty years have passed, but their vision continues to inspire the transformative work that happens at Penn Foundation every day. Through a broad range of mental health and substance abuse programs tailored to meet individual needs, Penn Foundation provides responsive, innovative care to more than 10,000 children, adolescents, and adults each year. Our tradition of compassionate care combined with a strong belief in the healing power of hope and the possibility of recovery enables us to help individuals and families grow, develop, and recover to their fullest mental, emotional, and spiritual health.

LICENSURE

Pennsylvania Department of Welfare

ACCREDITATIONS

Association of Clinical Pastoral Education
Commission on the Accreditation of Rehabilitation Facilities*

International Center for
Clubhouse Development

MEMBERSHIPS

Bucks-Mont Collaborative
Franconia Mennonite Conference
Mennonite Health Services Alliance
National Alliance for the Mentally Ill
National Association of
Addiction Treatment Providers

National Council for Behavioral Healthcare
Pennsylvania Association of
Psychosocial Rehabilitation Services
Pennsylvania Community Providers Association
United States Psychiatric Association

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

STATEMENT OF ACTIVITIES

For the Year Ended June 30, 2015

REVENUE, GAINS, AND OTHER SUPPORT

Managed Medical Assistance	\$ 11,331,811
Fees from Counties	\$ 4,876,487
Client Billing & Commercial Insurance	\$ 3,322,907
Medical Assistance	\$ 1,399,397
Other Income	\$ 806,692
Medicare	\$ 514,331
Contributions	\$ 321,576
Grants & United Way	\$ 299,751
TOTAL	\$ 22,872,952

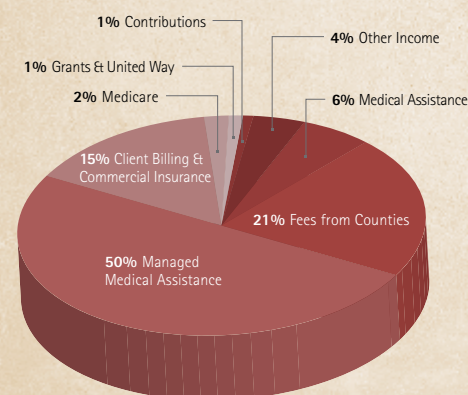
EXPENDITURES AND LOSSES

Program Services	\$ 19,570,593
Support Services	\$ 3,000,982
TOTAL	\$ 22,571,575

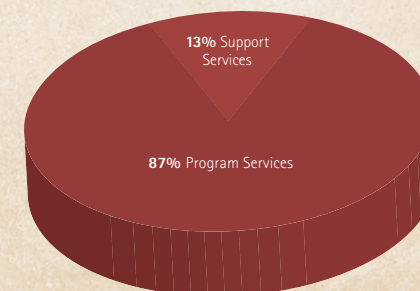
Change in Net Assets \$ 301,377

Unaudited Statement

The information included in this statement is unaudited.



REVENUE, GAINS, AND OTHER SUPPORT



EXPENDITURES AND LOSSES

“I have the definite conviction that the community, including the physicians, religious leaders, as well as the average lay person, is eager for such a service and will respond to a degree that will tax our imagination if we are faithful to providing the proper leadership.”

– PENN FOUNDATION FOUNDING MEDICAL DIRECTOR NORMAN L. LOUX, MD



PENN FOUNDATION

BEHAVIORAL HEALTH SERVICES

Instilling hope. Inspiring change. Building community.

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