

# groupassets



## Endowed Funds: Helping Today, Securing Tomorrow

*We make a living by what we get, but we make a life by what we give.* — Winston Churchill

Each year, the Group Foundation engages in fundraising activities to support the ongoing programs of the Foundation. We have yearly fundraising goals to ensure that the Leadership Fund and the Education and Scholarship Fund have sufficient income to support the work that is integral to the Group Foundation's mission to advancing the most effective and innovative approaches to group therapy education, training, research, and community outreach. However, yearly fundraising can be highly variable, depending on so many factors related to donors' personal circumstances, which in turn can be affected by the economic climate and societal issues. This is where another source of Group Foundation funding plays a valuable role—endowment funds.

An endowment fund is a set pool of invested money that provides a reliable source of income in perpetuity for a designated purpose. The annual distributions from an endowed fund, usually 4-5%, come from its investment income and provide support for an activity on a yearly basis while preserving its principal so the activity can continue. The financial steadiness afforded by such funds in turn provides program stability so that mission-based activities are not subject to the fluctuations in annual giving.

Endowed funds are playing an increasingly important role in the Group Foundation's work, particularly in the area of education and training. Sixteen events at the annual AGPA Connect meeting are supported through endowed funds. This includes 13 sessions through gifts to a consolidated educational endowment established as part of the capital campaign, two plenary sessions (the Alonso Plenary and the Mitchell Hochberg Memorial Public Education Event), and an annual lectureship (the Louis Ormont Lecture). Endowed funds also provide the opportunity to invite high-level speakers on timely and important topics.

Additionally, 15 scholarships annually provided to AGPA Connect are supported through endowed funds and provide the additional opportunity to support travel expenses for those attendees. There are also two annual Foundation awards that provide recognition to group work that advances the field (Alonso Award for Excellence in Psychodynamic Group Theory) and benefits local communities (Aaron Stein Memorial Award). These programs, awards, and scholarships are insured to take place each year due to the generosity of the donors who established these funds. We are extremely grateful to them all (please see the sidebar for the current endowments that support the Group Foundation programs).

Donors establish endowed funds for a variety of reasons. Your decision to make a significant gift to endow a program certainly provides assurance that a personally important purpose will continue to exist, independent of changes that may occur in other Foundation activities due to priority shifts or budgetary crises. Endowments can serve as a permanent tribute to you or to someone or something important in your life. It can extend your values for future generations, signaling your support of an important cause.

Endowments can be established by more than one individual donor, although a substantial gift or two is usually needed to seed the funding and reach the level needed along with a dedicated leader or group of leaders to coordinate the effort. The Austin Group Psychotherapy Society, for example, is serving as the matching donor to a number of individual contributions being made to establish an endowed fund in memory of Jay Erwin-Grotsky; there are commitments in place to make the fund a reality by AGPA Connect 2022.

There are a variety of ways to establish an endowment. If you want to set up this legacy now, the endowment can be established with one gift or multiple gifts over a few years (appreciated stocks and retirement fund distributions are options). Or a planned gift through a bequest or a charitable gift annuity can be put in place.

There are many options to consider as a way to secure the future of group therapy through a gift that funds a program near and dear to your heart. To explore the possibilities, take the first step by contacting Diane Feirman, CAE, Public Affairs Senior Director, or Marsha Block, CAE, CFRE, CEO, at 212-477-2677.

### ENDOWED FUNDS

Alonso Award Fund  
Anne and Ramon Alonso Endowment  
Anne Alonso Scholarship  
Donald T. Brown Memorial LGBT Scholarship Educational Endowment (13 AGPA Connect Programs Endowed)  
Josephine M. Cunningham Tervalon Scholarship  
Chuck Dachis Scholarship  
Barbara and Albert Dazzo Scholarship  
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Howard & Barbara Goldstein Scholarship  
Mitchell Hochberg Memorial Public Education Fund  
Ruth Hochberg Scholarship  
iScholarship  
Lorelle H. Machen, PhD, Memorial Scholarship  
Louis Ormont Endowment  
Red Well Theater Scholarship  
Kathy and Kent Rider Scholarship  
Saul Scheidlinger Scholarship  
Southwest GPS Scholarship  
Aaron Stein Memorial Award Fund  
Robert E. White, MD and Sara Jane White, PhD, Scholarship

*“AGPA was most important for Anne, and for me now to add to keeping her memory alive. For us, this was as close as we could get to taking it with us.”*

— Ramon Alonso, endowing donor, along with Anne Alonso, of the Alonso Award Fund, Anne and Ramon Alonso Endowment and Anne Alonso Scholarship

*“AGPA provides the best training for group therapy. My husband, Kent, was a civil trial attorney and was my biggest supporter of attending AGPA annually. Kent knew how valuable the training was and how important AGPA was to me... especially the people and relationships formed. In Kent's memory and to honor all the support he provided me and our family, I wanted to establish a scholarship to provide ongoing monies for needed group training to students and new professionals”*

— Kathy Rider, endowing donor, Kathy and Kent Rider Scholarship

*“My aunt died in 2010, and as I became more involved with the Group Foundation for Advancing Mental Health, it occurred to me that creating a scholarship to support clinicians who work with the severely mentally ill, as she had, would be a wonderful way to honor her and so much of her life's work.”*

— Eleanor Counselman, endowing donor, along with her cousin Leslie Vestrich (Lorelle's daughter), of the Lorelle H. Machen, Ph.D. Memorial Scholarship

### THE FACES OF OUR FOUNDATION

**Phyllis Hochberg Siegel, Esq.**

I am one of the lucky ones. I grew up in a tightly knit, loving family. As my brother and I followed high school and college with advanced degrees, my mother, Ruth Hochberg, PhD, DFLAGPA, continued her education, earning her doctorate in psychology. She began her AGPA/Group Foundation journey in 1974.



I watched and learned as Mom involved herself in the organization, as a presenter, committee member, committee chair, and Board Member of both AGPA and the Foundation. During those years, I wondered what drew her to devote so much of her energy to the organization.

My first meaningful contact with the Foundation occurred in 1984 following the death of my brother. The strength and power of the group only began to make real sense to me after my mother established the Mitchell Hochberg Memorial Public Education Fund in his honor. Here was my family standing up and saying, “we believe so strongly in the power of the group to heal, that we establish an endowment to provide an annual public education program at the AGPA meeting, open to the public and the professionals who are part of AGPA.” This was a big deal, and its message was not lost on me. When Mom was named Woman of the Year, a scholarship fund was created for a single female parent to attend the Annual Meeting, to honor my grandmother, herself a single parent raising two children alone.

I began to tag along with Mom at various Annual Meetings and found a community of caring, intelligent, and forward-thinking individuals whose company I enjoyed and who welcomed me in their midst.

As I became more interested in and better educated about the work of the organization and began to observe in my daily life how groups function and effect change, I began to think about whether there was a place for me in this community. My work as an attorney with the Capital Group Companies provided an entree for me with its generous matching contributions for charities actively supported by their employees. When Mom and I began to discuss the future, she asked me whether I would be interested in continuing her work on the Foundation Board once she was ready to step down. We talked about how nice it would be for us to be on the Board together for some years, and the rest is history.

As I sit here today, moving into the fifth month of pandemic isolation, the absence of group interaction has left a huge hole. The social feedback, camaraderie, and reality check from my groups is missing. In their absence, I am acutely aware of the power of my groups to provide balance and insight in my life. It is no wonder that it is so effective in the therapeutic setting.

I joined the Foundation Board in 2003 to participate in the Foundation's ongoing commitment to group. The Foundation is my charity of choice, and I am committed to further its work. I have been surrounded by warmth and love from this group of extraordinary individuals who have embraced me in my own right. Mom must have known that AGPA and the Foundation would become my very special extended family.

My mom was my best friend. It is a privilege to be able to carry on her legacy.

### LEGACY SOCIETY

We appreciate the provisions these planned gift donors have made for the Group Foundation.

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## Apply for a Scholarship Today

Attending AGPA Connect allows recipients to learn and grow personally and professionally, making connections that will last a lifetime. Through the generosity of its donors, the Group Foundation will again offer multiple funding opportunities to attend AGPA Connect 2021, which will occur completely online (specific dates and times to be announced).

To apply for a scholarship, visit AGPA's website at [www.agpa.org/Foundation/scholarships](http://www.agpa.org/Foundation/scholarships), where there is detailed information and required application forms. Application deadline is November 1, 2020. Additional questions? E-mail [angelajaramillo@agpa.org](mailto:angelajaramillo@agpa.org).

If you are interested in contributing to the Group Foundation to help qualified candidates attend AGPA Connect 2021, contact the Foundation office at 212-477-2677 or visit the website and click on *Donate Now*.

## Applications Being Accepted for New Endowed Scholarship This Year!

We are accepting for the first time applications for a new Red Well Theater Group Scholarship. The endowment supports an annual scholarship for an international student or early career professional to attend AGPA Connect with full tuition coverage. This scholarship has been generously endowed by Robert Schulte, MSW, CGP, FAGPA, of Alexandria, Virginia, to honor the Red Well Theater and its mission to support the training and development of group therapists. For more than a decade, Red Well provided creative group training at AGPA Connect. As the theater's run has come to a close, this scholarship will continue the legacy of that training. The concept that "all the world's a stage" was the inspiration to imagine the scholarship being awarded to students from around the globe.

## Additional Foundation Awards and Grants

In addition to its extensive Scholarship Program, the Group Foundation for Advancing Mental Health presents the following awards:

- The **Social Responsibility Award** recognizes an AGPA member or group of members, an Affiliate Society, or an affiliated organization of mental health professionals who has provided an exceptional service that ultimately benefits the public-at-large (deadline for nominations October 1, 2020).
- The **Humanitarian Award** is presented to an esteemed individual whose ability and position, either personal, corporate, foundation and/or politically based, has enabled them to do work reaching into and providing vitally needed services to a community (deadline for nominations October 1, 2020).
- The Foundation supports **Research** that demonstrates the effectiveness of group psychotherapy and is soliciting proposals for original, critical research reviews, either qualitative or quantitative (particularly meta-analyses), which focus on some selected area of group psychotherapy (deadline for nominations November 1, 2020).
- The **Group Foundation Tribute Program** is a campaign of appreciation, recognizing mentors, colleagues, and others of importance in our lives emphasizing their part in fostering the personal and professional development

of group psychotherapists. It is an opportunity to express your personal appreciation to someone through a gift to the Group Foundation for Advancing Mental Health. If you would like to take this opportunity to make a more significant gift, there are also opportunities to name a program at the upcoming AGPA Connect 2021; contact the Foundation office for information.

- The **Alonso Award for Excellence in Psychodynamic Group Theory** reasserts in a concrete way the value of original thinking about psychodynamic group theory. Individuals may qualify in a variety of ways. Suitable entries include doctoral dissertations, videos, published papers, and other creative research (deadline for nominations December 1, 2020).
- The **Aaron Stein Memorial Fund** annually recognizes organizations that utilize the creative applications of group theory and technique to benefit the community, particularly in non-psychotherapeutic settings (deadline for nominations December 1, 2020)

Detailed award and grant descriptions, as well as listings of past recipients are posted on AGPA's website at [www.agpa.org](http://www.agpa.org). For additional information, contact Diane Feirman, CAE, Public Affairs Senior Director, at 212-477-2677 or [dfeirman@agpa.org](mailto:dfeirman@agpa.org).

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