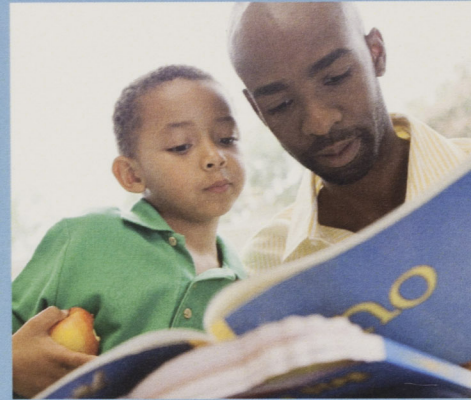


Engagement Report 2012



Hogg Foundation
for Mental Health

ADVANCING RECOVERY AND WELLNESS IN TEXAS

■ MESSAGE FROM THE EXECUTIVE DIRECTOR



Dear friends and colleagues,

It has been a privilege and honor to serve as the Hogg Foundation for Mental Health's executive director for the past four years. Since I took the position in 2008, the foundation has undergone tremendous change, reflecting the great strides that have been made to address the mental health needs of Texans. I am excited to share these changes in our first biennial Engagement Report.

As many of you know, in 2005 we shifted the way we award grants, moving to a competitive proposal process. Today, the foundation focuses on key priority areas with the greatest potential to benefit mental health. These key priority areas are:

- **Transforming care**
- **Enhancing public policy**
- **Promoting dialogue and learning**

We also launched a new branding initiative. With an updated logo, tagline and core values, we are able to better illustrate our mission and vision. The new logo is a circular burst of warm, energetic and friendly colors. It was developed with input from our key stakeholders: Texas consumers, family members, grantees, mental health professionals, advocates, policy makers and philanthropists. Our tagline, "Advancing recovery and wellness in Texas," conveys our strong belief that, with

the appropriate services and supports, people can and do recover from mental illness and lead productive, fulfilling lives. The new brand showcases our top priority and reflects our open and transparent culture.

With all of the changes, we still remain focused on stewarding the vision of our founder, Miss Ima Hogg, and advancing mental wellness for the people of Texas as an impactful grantmaker and catalyst for change.

From streamlining the grant process to transforming our brand, we are looking for ways to enhance the way we do business every day so that we can further achieve our mission. As you read through the report, it is my hope that you will be encouraged by the changes that we have made and by the remarkable work of our incredible team.

Best regards,

A handwritten signature in black ink, appearing to read "Octavio N. Martinez, Jr." with a stylized flourish at the end.

Octavio N. Martinez, Jr., M.D., M.P.H., M.B.A., F.A.P.A.

Executive Director, Hogg Foundation for Mental Health
Associate Vice President, Division of Diversity and
Community Engagement

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The University of Texas at Austin

■ INTRODUCTION



Mike Hogg



*James S. Hogg and his family
(Miss Ima at left) ca. 1890*



Ima Hogg, ca. 1900



Will C. Hogg, ca. 1915

The Hogg Foundation for Mental Health was established 72 years ago by the children of Texas Governor James Hogg. The original \$2.5 million endowment from which the foundation was created came from the estate of Will C. Hogg, the oldest of the Hogg children. Upon his death in 1930, his sister Ima and his brother Mike established the Hogg Foundation for Mental Hygiene (the organization's original name) in his memory at The University of Texas at Austin. The foundation started operation in September 1940. Since then, the foundation has granted over \$53 million from the Will C. Hogg endowment fund.

Before Miss Ima died in 1975, she established an endowment at the Hogg Foundation to provide mental health services for children, youth and their families in Houston and Harris County. The fund was activated after her death. Since 1976, the Ima Hogg endowment has funded 167 grants totaling more than \$28 million.

Since its inception, the foundation has worked to advance the mental wellness of the people of Texas. In its early years, the foundation sent experts and university scholars to small communities and rural areas across the state to speak about positive, preventive and therapeutic aspects of mental health. This rich tradition of education and engagement, established by the foundation's first leader, Robert Lee Sutherland, continues today. The foundation hosts conferences, training seminars, stakeholder meetings and other public events on mental health.



The foundation began its role as a grantmaker in 1955, awarding grants for research, training and fellowships to help practitioners, students and nonprofit organizations better address emerging challenges in mental health care. As part of its strategic planning process in 2005, foundation staff met with state and national stakeholders to identify critical areas in which the foundation could have a significant impact. Through this process, the foundation selected priority funding areas.

Our three priority areas are now transforming care, enhancing public policy, and promoting dialogue and learning. In each of these initiative areas, we strive to create programs that improve the availability, delivery and effectiveness of mental health services for consumers, youth and their families; we support nonprofit advocacy and public policy work to achieve meaningful, systemic change in mental health services and to improve the lives of people with mental health conditions; and we support learning and dialogue to raise the profile of mental health and to address mental health challenges in Texas communities.

In the design of each of our initiatives, we are mindful of creating programs that have the potential to improve the mental health of all Texans. We engage the communities we serve by going directly to the stakeholders and focusing on mental health consumers and their recovery as we seek to influence culture change.

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■ CONVENING COMMUNITIES



Convening communities is one of the foundation's key strategies to engage constituents and promote dialogue and learning. Since its establishment, the Hogg Foundation has hosted countless events, including conferences, training seminars, stakeholder meetings and, in 2011, its first webinar.

The foundation convenes communities to educate people about the issues currently affecting mental health in Texas. These events highlight trends in mental health, best practices, expert opinions and important legislative topics. Participants include thought leaders, service providers, legislators, consumers, youth and their families, advocates and funders.

Robert Lee Sutherland Seminars

With a small staff and an annual budget of \$20,000, the Hogg Foundation in its early years set out to educate the people of Texas about “mental hygiene.” The foundation did this through two main activities: developing resources and convening communities. Together with other experts, Dr. Robert Lee Sutherland traveled the state, promoting the positive, preventive and therapeutic aspects of mental hygiene.

The Robert Lee Sutherland Seminars began in 1978 as a living tribute to the academic, philanthropic and mental health contributions of Dr. Sutherland, who led the Hogg Foundation from 1940 to 1970.

The 17 seminars have focused on critical issues in mental health, including the needs of juveniles in the criminal justice system; mental health challenges along the Texas-Mexico border; integrated health care; recovery and wellness; and faith, mental health and the African American community.



Austin Area African American Behavioral Health Network

The foundation sponsors a network for individuals interested in learning more about mental health, wellness and recovery in the African American community. The members of the Austin Area African American Behavioral Health Network meet regularly to learn about behavioral health challenges of African Americans, to engage in networking opportunities and share information about community resources.



"The Austin Area African American Behavioral Health Network gave me the extra boost I needed to connect with other professionals, consumers and individuals who are interested in making a real difference related to behavioral health. I always leave the meetings with a new perspective on mental health and how to stay well!"

– Rhonda Douglas



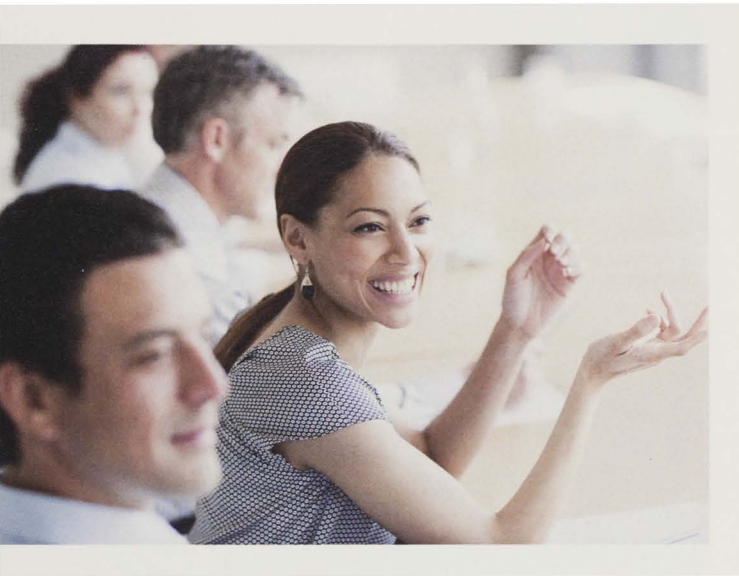
Ima Hogg Children's Mental Health Initiative

The Hogg Foundation awarded Harris County Joint City/County Commission on Children a \$99,970 grant to develop a 10-year strategic plan to improve delivery of children's mental health services in the Houston area. During the 18-month strategic planning process, community stakeholders found that children and families need better access to quality services that promote mental health and that quickly identify, intervene in and treat mental health needs. Today, the foundation provides funding for children's mental health grants to address some of the challenges identified by the Houston community in the strategic plan.

To continue engaging the Houston community, the foundation started hosting a biennial conference to provide free, quality training to Houston/Harris County service providers, family members and advocates on current best practices and resources in children's mental health.



■ ENGAGING STAKEHOLDERS



To fulfill its mission as an impactful grantmaker in Texas, the foundation must strategically design its grant programs, and it does so by using a grassroots approach and collaborating with direct beneficiaries and stakeholders. It also partners with beneficiaries to identify areas that are in need, collaborating on possible solutions and designing a grant program that has the potential to create significant change in the mental health of Texans.

By truly listening to stakeholders, the foundation is able to respond to community needs, create transparency with its constituents and be a more efficient, effective and ethical grantmaker.

Bilingual Scholarship Program

Texas is racially, ethnically and linguistically diverse. Studies have shown that ethnic minorities are underrepresented in social work and other mental health professions. With more than 90 languages spoken in the state, the need for a multilingual workforce is high.

Language differences can be a huge barrier in providing effective mental health services. As a result, non-English-speaking populations are far less likely to receive effective mental health services that meet their cultural and linguistic needs. According to the 2010 U.S. Census Bureau, Spanish is the second-most commonly spoken language in Texas. The bureau also reported that in 2009, the number of Hispanics living in Texas reached 9.1 million. Texas had the second highest Hispanic population of all the U.S. states in 2010.

To address this need, the foundation met with the 12 accredited social work schools in Texas to develop an innovative program. With their insights, the foundation was able to establish a groundbreaking bilingual scholarship program.



The new statewide program was the first of its kind in Texas and possibly in the U.S. This bold, forward-thinking program encourages linguistic and cultural diversity in higher education and inspires more interest in social work as a profession. The foundation saw a need in Texas and responded by implementing a program that had the potential to affect change and directly address the need.



“The Hogg Foundation Bilingual Scholarship has made a great difference in my life. The scholarship not only provided financial assistance, but most importantly, gave me the opportunity to gain valuable knowledge and experiences that have enhanced my skills as a culturally competent social worker. The support I received from my mentor and the foundation was truly inspiring and motivating.”

– Melina Chavez, The University of Texas at El Paso, 2012

The Hogg Mental Health Policy Academy

Recognizing that public policy plays a critical role in achieving positive change, the Hogg Foundation created an innovative fellowship program in 2010 to cultivate and empower a new generation of Texas policy specialists for mental health.

Five nonprofit organizations were awarded funding to support two-year fellowships. Each fellow is paired with an experienced mentor. Both the fellows and the mentors participate in the Hogg Mental Health Policy Academy. The academy provides training and support for the fellows, their mentors and others involved in policy work in Texas. Throughout the year, the academy conducts training sessions, teleconferences and meetings with experts to enable the fellows to develop the critical public policy skills needed to become effective public policy professionals.

In January 2012, the first class of Hogg Foundation policy fellows, their mentors and several foundation staff spent five days in Washington, D.C., for intensive policy training. Participants met with national policy experts from top mental health organizations and federal agencies. The trip provided the fellows with an extraordinary opportunity to gain insight from key policy professionals about national mental health policy initiatives. Several months after the initial training, the fellows returned to Washington to meet individually with experts in their particular areas of interest.

■ FOCUSING ON CONSUMERS



The Hogg Foundation has strengthened its focus on consumers in recent years, recognizing that individuals who have experienced mental health challenges and their families can play a key role in recovery. The foundation seeks to encourage and support mental health consumers on their unique, personal journeys toward recovery and wellness, tailoring its initiatives to the needs of consumers who have been through the process of recovery and wellness firsthand. Their knowledge, experience and perspectives can bring hope to others. Consumers also can best identify and advocate for improvements to existing mental health systems and services.

This fundamental shift in ethos occurred when the foundation changed its grantmaking criteria to include consumer, youth and family involvement. Since 2008, grant proposals have typically been required to articulate how the grant seeker intends to involve consumers, youth and family members from beginning to end of the grant project. The result has been greater awareness among grant applicants of the value that consumers, youth and family members bring to organizations.

The Hogg Foundation also hired two consumer and family liaisons in 2008 to bring the perspectives of consumers, youth and family members into the foundation's process for grantmaking, operations and decision-making. The liaisons, Stephany Bryan and Tammy Heinz, serve as program officers who manage grant initiatives, conferences and other foundation activities. They also participate in local and state consumer organizations, share their expertise with federal, state and private sector agencies and are popular speakers on a variety of topics.

In 2009, the foundation appointed mental health experts and consumer advocates Dr. Daniel Fisher and LaVerne Miller, Esq., to its National Advisory Council. Fisher is a board-certified practicing psychiatrist and executive director of the National Empowerment Center. He has recovered from schizophrenia and works tirelessly to dispel the myth that people do not recover from mental illness and to reorient the mental health care system toward recovery and wellness.



Miller is an attorney and consultant whose career has centered on mental health and social justice. Following years of severe depression, Miller realized that finding meaningful work and peer support were critical for her own recovery, as well as for many other consumers. She currently works with Policy Research Associates and the federal Center for Mental Health Services to increase consumer, youth and family engagement and involvement in state initiatives and activities supported by federal mental health transformation grants. The involvement of both Fisher and Miller on the National Advisory Council helps shape the foundation's initiatives to promote consumer, youth and family engagement in mental health care in Texas.

Via Hope

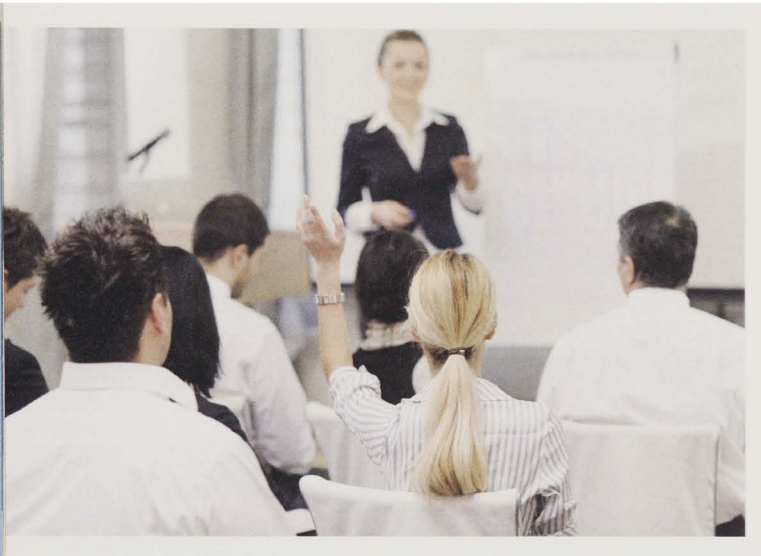
In 2009, the Department of State Health Services awarded a grant to a partnership between Mental Health America of Texas and National Alliance on Mental Illness Texas to develop a training and technical assistance center for mental health consumers, family members, youth and professionals. This eventually became Via Hope. Part of the larger vision for Via Hope was to develop and implement a statewide peer support training and certification program. The Hogg Foundation was particularly interested in this area of workforce development and funded Via Hope from 2010 to 2012. The foundation also funded Via Hope to include family and youth in their workforce development.

The East Texas Coalition for Mental Health Recovery

The East Texas Coalition for Mental Health Recovery (ETCMHR) has brought together 12 mental health organizations to develop a network of consumers, peer specialists, providers and advocates with the goal of building leadership in mental health, recovery and wellness, and increasing consumer and family involvement in the public mental health care system. Through the coalition, members were offered the opportunity to participate in Wellness Recovery Action Planning (WRAP) as part of a two-year pilot project. In the second year of the project, members were offered the opportunity to become WRAP facilitators as well as certified peer specialists. This model is gaining recognition as a successful approach to achieving recovery. A powerful tool for building leadership potential, peer specialists are highly effective because they have lived through experiences similar to those of consumers. In addition, their services can relieve shortages in the state's mental health workforce.



■ INFLUENCING CULTURE CHANGE



For the foundation to truly have an impact, it must produce meaningful change. The foundation strives to move the needle and promote change at all levels.

Full-scale change can only begin when consumers, policymakers, service providers and the general public have accurate and comprehensive information so that they can make informed decisions.

Seclusion and Restraint Reduction Initiative

Seclusion and restraint are controversial behavior management techniques used by many Texas agencies that provide services to adults and children with mental health conditions. The use of seclusion and restraint is considered a failure in treatment. It can be traumatic and dangerous to consumers and staff. It can cause severe physical and psychological harm, and even can lead to death. It can also lead to mistrust and power struggles that prevent the development of positive therapeutic environments and that hinder recovery.

The Hogg Foundation supports efforts to identify effective, safe alternatives to seclusion and restraint techniques through research, policy initiatives and education.

As part of this initiative, the Hogg Foundation facilitates the Texas Seclusion and Restraint Reduction Leadership Group. Formed in 2007, the group includes mental health consumers, family members, advocates, and private and public agency representatives intent on changing the culture of organizations that serve people with mental illness and providing expertise for other stakeholders.

In 2011, the foundation awarded a three-year grant to provide technical assistance to residential treatment centers implementing trauma-informed systems of



care to reduce their reliance on seclusion and restraint. As part of this project, the foundation in January 2012 hosted two training seminars on trauma-informed systems of care attended by staff from many Texas residential treatment centers. The seminars were led by national experts on trauma-informed care. Texas Network of Youth Services is providing intensive technical assistance and follow-up support to selected residential treatment centers for up to three years after the training seminar.

Also in 2012, the Hogg Foundation partnered with the Department of Aging and Disability Services to provide training and technical assistance on trauma-informed care to service providers that support individuals with intellectual disabilities. Understanding the effect of trauma on behavior and using trauma-informed strategies can help reduce the use of restraint in both facility and community settings. The foundation coordinated trainings at two state-supported living centers in February 2012. Both facility staff and community service providers were invited to participate. As organizations begin to plan and implement new strategies learned at the trainings, the foundation will offer ongoing technical assistance to support the restraint reduction efforts.

Eliminating Racial and Ethnic Disparities through Integrated Health Care

On November 7-8, 2011, the Hogg Foundation hosted an experts meeting to examine the intersection of integrated health care and cultural and linguistic competence. National leaders came together to propose ways to deliver integrated health care services in culturally and linguistically appropriate ways to racial and ethnic minorities and populations with limited English proficiency.

The foundation, in partnership with the federal Office of Minority Health, published a consensus report of the meeting and hosted a follow-up conference in Austin, Texas. The report and the conference focused on eliminating health disparities through integrated behavioral and physical health care. The conference featured national experts, including Dr. Nadine Gracia, acting deputy assistant secretary for minority health and the acting director of the Office of Minority Health at the U.S. Department of Health and Human Services. In addition to publishing the consensus report, the foundation also completed and published a literature review. Both publications can be found on the foundation's website.



Dr. Martinez, Dr. Nadine Gracia, Rick Ybarra, and Dr. Teresa Chapa talk before the start of the one-day conference on eliminating racial disparities through integrated health.

■ BY THE NUMBERS *Here is a snapshot of what the foundation has been up to in the past four years:*

Over **8,000** Language Matters in Mental Health brochures distributed

\$9.9 million to 8 organizations to expand and improve mental health services for more than 10,000 children, youth and their families in Houston and Harris County

\$2.2 million to 4 grant sites to create internships for doctoral psychology students that will help alleviate mental health workforce shortages in Texas

\$1.6 million for 18 projects addressing mental health policy issues in Texas, such as wrongful convictions, immigration detention, juvenile justice systems, boarding home standards, and state custody of children with both mental illness and developmental disabilities

109 bilingual graduate social work students received full-tuition scholarships in an effort to increase Spanish-language mental health services in Texas. The program is expanding to other languages in Texas

\$701,297 in 4 years to tenure-track assistant professors in Texas for 33 cutting-edge research projects, such as adult depression in rural Texas towns, mental health care preferences of Iraqi war veterans, and potential links between childhood obesity and mental health

\$653,298 to create the consumer-led East Texas Coalition for Mental Health Recovery, which is building leadership in mental health, promoting recovery and wellness, and increasing consumer and family involvement in public mental health

\$589,172 to coordinate training and technical assistance to residential treatment centers around trauma-informed care

\$368,077 to support trauma-informed care training and technical assistance to 2 state-supported living centers and community providers

\$653,285 for a new mental health policy fellowship program and policy academy to train the fellows, their mentors and others involved in advocacy work in Texas

\$155,000 in 4 years to 31 graduate social work students in Texas who plan to provide mental health services

\$120,000 in 4 years to support doctoral research of human trauma caused by major disasters or stress and adversity

\$61,000 to fund 4 mental health training programs for adults who work with children and youth in the Houston area

300 counselors, teachers, parents and others who work with children attended a one-day conference in Houston on meeting the mental health needs of children, youth and families

350 stakeholders from around the state gathered in Fort Worth for a free statewide conference, "Spiritual Crossroads: Faith, Mental Health and the African American Community"

320 consumers, policy makers, health care providers and mental health funders attended a one-day conference to promote integrated health care as a means of eliminating health disparities in racial and ethnic minority populations and persons with limited English proficiency



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