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Endowed Funds: The Gift that Keeps on Giving

Each year, the Group Foundation engages in fundraising activities to support its ongoing programs. Its yearly fundraising goals 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 of advancing the most effective and innovative approaches to group therapy education, training, research, and community outreach. Yearly fundraising, however, can be highly variable, dependent on many outside factors related to donors' personal circumstances, which in turn can be affected by the economic climate and societal issues. This is why another source of Group Foundation funding plays a valuable role—endowment funds.

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

Endowed funds play an increasingly important role in the Group Foundation's work, particularly in the areas of education and training. Eighteen events at AGPA Connect 2024 were supported through endowed funds. This included 12 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 Educational Event), and an annual lectureship (the Lou Ormont Lecture). For exciting news, please see the article *New Endowed Funds for 2024* for information on new endowments for the Institute Opening Plenary (Sally Henry Endowment) and the Principles of Group Psychotherapy Course (Marsha S. Block Endowment).

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Additionally, 17 annual scholarships to AGPA Connect are supported through endowed funds and include supporting travel expenses for scholarship recipients. We are excited to also announce (see separate article) a new international scholarship in memory of Sally Henry, LCSW.

Annual Foundation awards also recognize group work that advances the field (Alonso Award for Excellence in Psychodynamic Group Theory), as well as creative arts-

based and non-therapeutic groups (Aaron Stein Memorial Award). Starting in 2025, the Social Responsibility Award will be endowed and named in tribute to Robert Klein, PhD, ABPP, CGP, AGPA-DLF (see separate article).

These programs, awards, and scholarships are guaranteed to take place each year due to the generosity of the donors who established these funds, and the Foundation is extremely grateful to them all. The article (*Additional Foundation Awards and Grants*) lists existing endowments that support the Group Foundation programs.

Your choice to make a significant gift to endow a program 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. They also can serve as a permanent tribute to you or to someone or something important in your life. An endowed fund can extend your values for future generations, signaling your support of an important cause.

Donors establish endowed funds for a variety of reasons. Your choice to make a significant gift to endow a program 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. They also can serve as a permanent tribute to you or to someone or something important in your life. An endowed fund can extend your values for future generations, signaling your support of an important cause.

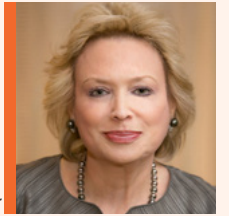
Endowed funds don't always need to be established by just one individual donor (although a substantial gift or two is usually needed to seed the funding and reach the level needed along with a dedicated leader or group of leaders to coordinate the effort). There are a variety of ways to establish an endowment. If you want to establish 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, at dfeirman@agpa.org.

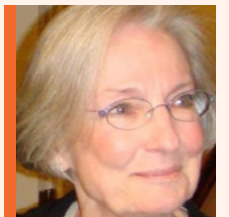
NEW ENDOWED FUNDS 2024

Marsha S. Block Endowment

Fund: Created in tribute to Marsha Block, CAE (Ret.), CFRE (Ret.), CEO Emeritus, this fund is part of the Group Foundation's Education Endowment, and specifically supports the annual delivery of a Core Principles of Group Psychotherapy Training Course, which fulfills the 15-hour group psychotherapy theory and practice course requirement for the Certified Group Psychotherapist (CGP) credential. Ms. Block's support of this course through her endowment fund is a testament to her commitment to the training and mentoring of those entering the field of group therapy, as well as to the demonstration of standards in the field through certification. The first offering of the course under the Marsha S. Block Endowment took place at AGPA Connect 2024.



Sally Henry, LCSW, a long-time AGPA member, Foundation Board member, educator, and generous donor, left the Group Foundation for Advancing Mental Health a generous bequest. The Group Foundation Board approved using this unrestricted bequest to establish two endowments to honor Sally's lifelong ties to experiential group training programs in the United States, as well as internationally.



Sally B. Henry Endowment Fund: This fund will be part of the Foundation's Education Endowment and will be used to endow and name in Sally's honor the Institute Opening Plenary session at the annual AGPA Connect.

Sally B. Henry International Scholarship: This fund will support at least one international attendee annually at AGPA Connect, and/or E-Learning programming and CGP Certification fees, including training leading to the CGP certification.

Robert H. Klein Social Responsibility Endowment:

This endowment fund has been established by Aaron Klein in tribute to his father, long-time AGPA member and Past President Robert Klein, PhD, ABPP, CGP, AGPA-DLF, who passed away in 2023. It will endow and name in Dr. Klein's honor the Social Responsibility Award that is presented annually to an AGPA member, 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. This award had great meaning and significance to Dr. Klein, who received it onsite in New York City in 2020, recognizing him for his lifelong commitment to helping communities heal after traumatic events and his generous nature in providing *pro bono* work.



LEGACY SOCIETY

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

Ramon Alonso
Maryetta Andrews-Sachs
Shari & Allan Baron
Patricia & Merle Barth
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Marsha Block &
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2024 CONTRIBUTIONS TO THE GROUP FOUNDATION FOR ADVANCING MENTAL HEALTH

GIFTS ACKNOWLEDGED HERE ARE FROM JANUARY 1, 2024 THROUGH JUNE 30, 2024

Our thanks and appreciation to the donors whose support makes our programs possible. In recognition of our belief that gifts of all sizes are important and contribute to our mission to advance the field of group therapy, the Group Foundation will be presenting its donor listing in alphabetical order. We will continue to explore ways to acknowledge and thank our donors and welcome your feedback.

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Kristin Burke					Gil Spielberg	Ellen Ziskind

ADDITIONAL FOUNDATION AWARDS AND GRANTS

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

- The Robert H. Klein 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 is October 1, 2024**).
- 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 is October 1, 2024**).
- 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), that focus on some selected area of group psychotherapy (**deadline for submissions is November 1, 2024**).

- 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 is December 1, 2024**).

Detailed award and grant descriptions, as well as listings of past recipients, are posted on AGPA's website at www.agpa.org/Foundation/awards. For additional information, contact Diane Feirman, CAE, Public Affairs Senior Director, at dfeirman@agpa.org.

In Honor of Contributions (donor is listed in parentheses)

Maryetta Andrews-Sachs (*Emily Goodstein*)
Marsha Block (*Jeffrey Kleinberg*)
Leo Leiderman (*Darryl Pure*)
Hilary Levine (*Adam Frankel*)
Ronnie Levine (*Eva Fyer*)
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In Memoriam Contributions (donor is listed in parentheses)

Yvonne Agazarian (*Paul Kaye*)
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Dustin Nichols (*Douglass Clark*)
John Pully (*Jeffrey Hudson*)

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INTERIM EDITOR Diane Feirman, CAE
MANAGING EDITOR Angela Stephens, CAE
EDITORIAL/PRODUCTION MANAGERS
Desiree Ferenczi, MA, Nicole Millman-Falk

GROUP FOUNDATION FOR
ADVANCING MENTAL HEALTH
529 14th Street, NW, Suite 1280
Washington, DC 20045
212-297-2190
e-mail: info@agpa.org • www.agpa.org

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