

A LASTING IMPRINT:

Creating Mindful Opportunities

2023
HIGHLIGHTS
REPORT

The mind is a precious resource.

One that deserves to be nurtured, inspired, and empowered.

The Foundation's focus areas, while distinct in many ways, share a common goal of helping people reach their full potential. We support the mind by reducing financial barriers to education, bolstering the mental health workforce, and expanding access to care for those living with serious mental illness.

We're also intentional about where we direct our attention and resources. Beyond financial investments, we find value in cultivating strategic partnerships, advocacy alliances, and networking pathways.

This report highlights our most recent efforts. Thank you for joining us in creating opportunities for minds to heal and thrive.



A message from the Foundation.

Philanthropy plays a critical role in our communities. As a private foundation, we have the ability to be nimble and avoid the delays that often ensnare even the most efficient public institutions. We can foster new programs, champion innovation in our fields of interest, and lift the voices of people living with mental illness and their families, as well as peers, providers, and practitioners.

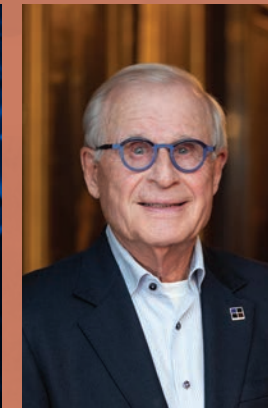
At the start of 2023, New York Attorney General Letitia James held a public hearing on mental health care in Western New York. We joined community members and providers to discuss challenges in accessing care and the need for greater investments in treatment services, workforce, and facilities. In the Foundation's submitted testimony, we acknowledged the State's prioritization of mental health and highlighted two areas of significant concern — the workforce shortage and the need for increased collaboration and shared accountability.

Beyond our mental health advocacy at the state level, we are working to address systemic issues regionally. At the invitation of Erie County, we serve on a mental health crisis response committee that is assessing the system to ensure existing and new services are well

coordinated, accountable, and effective. The Foundation is advancing this critical work by leveraging our network of national partners to provide valuable insights and expertise to help inform the committee's efforts.

Our advocacy also extends to our education initiatives. The rising cost of post-secondary education disproportionately impacts students from middle-income households, who often do not receive sufficient state and federal aid. Given recent changes to the Free Application for Federal Student Aid (FAFSA), these students and families struggle to navigate a challenging and ever-evolving system. We are in constant communication with our partner schools to understand where our assistance is most needed for our scholars.

Advocate, investor, and convener are roles we proudly fill to further our mission. But our work cannot be accomplished in isolation. We remain mindful of the essential need for public investment and collaboration if our work is to have the impact we seek. So, we continue to build partnerships — across sectors — to sustain and grow our critical long-term initiatives.



Patrick P. Lee
Founder

Jane M. Mogavero
Executive Director



2023 at a glance



Our cumulative impact.

\$23+ million awarded

450 Lee Scholar alumni
throughout the country

\$3.1+ Million Awarded

116 Lee Scholars

86 in STEM
+ Engineering

30 in
Mental Health

**\$1 Million
in Grants** to build the capacity
of the mental
health workforce

2 Annual Convenings
bringing together Lee Scholars,
alumni, and board members

PARTNERING AND LEARNING FROM THOUGHT LEADERS

In 2023, we welcomed experts from across the United States to our newly formed STEM and Mental Health Advisory Committees, which offer insights and recommendations on initiatives related to the Foundation's goals.

Creating brighter futures.

As the Foundation’s longest-running program, our Lee Scholarships invest in students pursuing education in engineering and STEM fields whose family income prevents them from receiving sufficient financial aid. In addition to financial assistance, we are committed to building a professional network around students.

Recognizing the convergence of engineering and technology, the Foundation established a scholarship program for computer science majors at four current partner schools — RIT, Saint Louis University, Syracuse University, and the University of Rochester. We also developed a new partnership with Alfred State College, a school at the forefront of post-secondary STEM education in our region.

The Foundation was pleased to recognize 86 STEM and engineering Lee Scholars. As we look toward 2024, we will continue to be guided by these principles and further expand the Lee Scholarship within New York State and beyond.

Bringing our community together.

In 2023, the Foundation’s annual convenings in Rochester and St. Louis united 65 scholars from nine partner schools, five Distinguished Lee Scholars, alumni, and board members.



ACADEMIC PARTNERS

- Alfred State College
- Canisius University
- Clarkson University
- Erie Community College (SUNY Erie)
- Monroe Community College
- Niagara County Community College (SUNY Niagara)
- Rensselaer Polytechnic Institute
- Rochester Institute of Technology
- Saint Louis University
- Syracuse University
- University of Rochester



“The Lee Foundation does an amazing job of bringing together a truly special group of bright young minds with their eyes on the future. My experience with this network has changed my life, and I am so grateful I have gotten to be a part of this.”

DAVID BRODSKY,
SYRACUSE UNIVERSITY



“I am so honored to be part of the Patrick P. Lee community! It has connected me both to my classmates and the greater foundation and alumni network. I love seeing everyone do great work in our communities, build each other up, and inspire future engineers!”

CARLY SEAR,
SAINT LOUIS UNIVERSITY



“I am extremely grateful and honored to be awarded this scholarship. I come from a family who could not attend college without the worry of paying tuition and providing for the family. I will be the first in my family to graduate college. I have children of my own, and I am looking forward to seeing them follow in my footsteps and making this a tradition.”

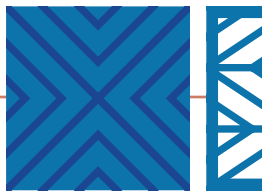
JOE MARTIN,
SUNY ERIE



“The Lee Foundation’s support has provided me peace of mind and empowered me to excel academically as I work toward my undergraduate degree. Their commitment to fostering leadership, integrity, and service inspires me to actively integrate these principles into my personal and professional life.”

JENNIFER HAYCOOK,
CLARKSON UNIVERSITY





Distinguished recognition for exemplary scholars.

The Foundation created the prestigious Distinguished Lee Scholar Award in 2017 to honor an exceptional Lee Scholar exemplifying the Foundation’s values of integrity, leadership, and service to others. This yearly award provides grant funding to eliminate a recipient’s qualified student loans.

In 2023, the Foundation named a Distinguished Lee Scholar from a bachelor’s program and launched a new award for students pursuing associate degrees.



CALVIN NAU

Calvin Nau, a Rochester Institute of Technology (RIT) graduate with a BS in Industrial Engineering and MS in Industrial and Systems Engineering, is a diligent student focused on integrating academic research into real-world settings. While serving in various leadership positions on campus, Calvin consistently found ways to volunteer and assist his fellow students.

According to his research advisor, “Outside of official leadership positions, Calvin always assumes a leadership role in groups. I can say with great enthusiasm that he deserves this award and would represent the Lee Foundation extraordinarily well.” Calvin is now a software engineer at CUBRC pursuing a PhD in Mechanical and Industrial Engineering at RIT.



KOREY MACDONALD

Korey MacDonald, a nursing graduate from Niagara County Community College (SUNY Niagara), was selected for this inaugural award because of his dedication to the medical field and passion for helping others. While in school, Korey was elected as a class representative to the Student Nursing Association and mentored his classmates.

One of Korey’s professors noted his propensity to uplift those around him, commenting that he “surpassed my expectations for student performance both academically and personally. His engagement during class time encouraged other students to speak up.” After graduation, Korey became a nurse on the medical-surgical floor at Erie County Medical Center and plans to transition to the hospital’s psychiatric unit.

Building new possibilities. **ENRIQUE CARDOSO-NAJERA**

For Lee Scholar Enrique Cardoso-Najera, the dream of becoming a professional engineer blossomed while earning an associate degree at SUNY Orange. “Going to community college was one of the best decisions I ever made,” he recalled. “I had great mentors who helped build my understanding of engineering and taught me that I could do anything and go anywhere.”



“The Lee scholarship is making it possible for me to pursue the business and entrepreneurial aspects of engineering.”

With encouragement from his mentors, Enrique entered the 2022 Community College Innovation Challenge, sponsored by the National Science Foundation, where students develop STEM-based solutions to real-world problems. Enrique and his team designed and built a solar-powered vaccine refrigerator that can maintain the temperatures needed for life-saving medication in countries facing electrical instability. His team was named one of 12 national finalists invited to present their designs at the Library of Congress. “It taught me about the other side of engineering,” he said. “Like how to bring products to life by developing prototypes and working with investors.”

Enrique is now at Rochester Institute of Technology, where he became a Lee Scholar. He’s studying civil engineering technology and business, with the goal of combining a career in aviation design with his interests in enterprise management. He’s eager to “work both on the technical components of a project and with people and clients.”

After graduation, Enrique hopes to help the next generation of Lee Scholars uncover their professional passion. “Giving back is the best way that I can pay it forward,” he added. “By supporting a network to help future students who are where I am right now.”



The ripple effect of a scholarship. **KAY WILKOFF**

Kay Wilkoff’s life defies categorization. She is a veteran social worker who returned to school and graduated with a 4.0 in a STEM field, the former president of Monroe Community College’s (MCC) Optics Club, and a busy working mother who has fostered over 25 children. Now, she can add Lee Scholar to her list of impressive accomplishments.



In the fall of 2021, Kay enrolled in MCC’s Optical Systems Technology program, driven to pursue a STEM career and provide for her growing family. The following year, at a crucial juncture in her family’s life, she was named a Lee Scholar.

Kay and her husband had just accepted an emergency foster placement of a sixteen-year-old girl, Erica, who experienced suicidal ideation and was in dire need of familial guidance. With the financial relief afforded through the scholarship, Kay was able to focus on Erica’s mental health needs and provide her with a permanent, loving home. “The Lee Foundation’s scholarship is the thread of hope that empowered my educational journey and stabilized my family environment, allowing me to continue fostering,” Kay shared. “This resulted in a teenager having a family and support system at a critical time in her life.”

“The scholarship created a big green light over my future.”

After graduating in 2023, Kay began working as a sales account manager at Sydor Optics, bought a house, and continued to parent Erica. She is now helping Erica navigate the college enrollment process, a goal that once seemed unattainable. Kay attributes these life-changing developments to a “ripple effect that began with the Lee Foundation’s gift.”



MENTAL HEALTH

Lifting up the mental health field.

For nearly two decades, the Lee Foundation has advocated for mental health in the medical community and through legislative bodies while continuing our community education efforts. We are committed to improving the lives of every adult living with a mental health condition and have a special interest in supporting and empowering those living with serious mental illness.

Our work is guided by the knowledge that with effective treatment and services, wellness and recovery are possible for everyone. In recent years, we have focused our investments on strengthening the capacity of the regional mental health workforce and ensuring community members have access to high-quality programs and services.

Reducing barriers to starting a career.

Our mental health scholarship program addresses the financial hurdles that may prevent someone from entering the field.

Our first scholarships in 2016 were awarded to third- and fourth-year medical students attending the University at Buffalo and specializing in psychiatry. The scholars, who grew up in Western New York, signed a pledge confirming their intention to remain in the region for five years after residency. Through the years, we expanded the scholarship program to doctoral psychology interns and psychiatric-mental health nursing students.



INSPIRING COUNSELORS AND SOCIAL WORKERS

In 2023, we added Clinical Mental Health Counseling at Canisius University and the Master of Social Work program at Daemen University to the scholarship program.

Nationally, the average graduate student loan debt accrued by social workers and mental health counselors is over \$49,000, nearly the amount of the reported median annual salary for the professions. This imbalance contributes to high turnover in the field and limits interest in mental health-related professions altogether.

CUMULATIVE IMPACT

In just seven years, we have awarded \$2.1 million in mental health scholarships. We now annually sponsor 30 students who are committed to remaining in Western New York.

Focused initiatives for recruitment and retention.

According to the Health Resource and Services Administration, over 155 million Americans — including approximately six million New Yorkers — live in mental health professional shortage areas. The rising costs of higher education and historically low wages deter people from entering the field. For the dedicated individuals who do persist, they are often saddled with student loans, large caseloads, and demanding work schedules.

In 2023, we invited organizations in Western and Central New York to submit proposals promoting the recruitment and retention of mental health professionals. We sought projects that removed financial barriers for individuals pursuing mental health careers and invested in the well-being and professional development of those already working in the field.

TRAINING PROGRAMS

The Foundation awarded \$600,000 to expand or launch internship programs with four organizations. These training opportunities allow students to refine their skills under valuable supervision and mentorship.

- BESTSELF BEHAVIORAL HEALTH
- COMPEER BUFFALO
- ENVISION WELLNESS WNY
- JERICO ROAD COMMUNITY HEALTH CENTER

"The generous financial support provided by this fellowship allows me to complete my education and internship without the financial strains typically encountered in traditional graduate-level internships."

SANDEE WARREN, FELLOW, ENVISION WELLNESS WNY



RETENTION GRANTS

In recognition of the dedicated individuals currently working in the field, the Foundation awarded six grants, totaling \$471,936, for staff professional development and wellness initiatives.

- CATHOLIC CHARITIES OF BUFFALO
- CHRISTIAN COUNSELING MINISTRIES OF WNY
- COMPEER ROCHESTER
- FAMILY AND CHILDREN'S SERVICE OF ITHACA
- JEWISH FAMILY SERVICES OF WNY
- OLV CHARITIES

"This grant shows our staff that we are invested in them, they are valued, and together, we will have a profound impact on the mental health of our community members."

ALECIA SUNDSMO, DIRECTOR OF CLINICAL SERVICES, FAMILY & CHILDREN'S SERVICE OF ITHACA



Returning home to start a career journey. MADISON CARLSON



As the child of health care workers, Madison Carlson was exposed to the medical field at a young age and always “felt comfortable in that environment.” Throughout high school, Madison sought learning opportunities that allowed her to shadow doctors and other professionals in both hospital and psychiatric inpatient settings. These experiences, coupled with her natural curiosity and empathetic nature, made her well-suited for medical school and a career in psychiatry.

After earning a biology degree from Ohio University, she applied to and was accepted by the University at Buffalo Jacobs School of Medicine and Biomedical Sciences. Returning to Buffalo was a priority for Madison, who wanted to be closer to her family — especially her grandmother, who lived in Niagara Falls, New York.

While in her third year of medical school, Madison was encouraged to apply for the Lee Foundation Scholarship by her advisor, Dr. Sergio Hernandez. “Receiving the Lee Foundation Scholarship was a huge deal and relieved me of the financial strain that so many of my classmates were trying to manage,” said Madison. “It also gave me the chance to remain in Buffalo, put down roots, and give back to the community that has provided me so much opportunity.”

Discovering her true calling. BRIANA PARTON



Briana Parton started her nursing career in the operating room at a hospital in Wyoming County. Growing up and then working in this rural community, Briana witnessed firsthand “generational struggles and the lack of resources — especially those addressing mental health needs.”

flexibility she needed to continue working at the Comprehensive Psychiatric Emergency Program (CPEP) at Strong Memorial Hospital.

While working at CPEP, Briana’s calling to help those with mental health illness was affirmed. “I am able to connect with people quickly — even when they are in crisis — and earn their trust,” she said. “We all struggle at some point, and I want to help decrease the stigma so people get the help they need.”

Caring for her family, working, and taking classes is challenging, but Briana is “determined to complete the program.” With the Foundation’s backing, Briana was able to reduce her work hours, increase her credit hours, and focus on her classes. Briana is on track to graduate in 2026 and is grateful she was able to advance her career without needing loans.

After noticing COVID’s impact on her family’s and friends’ mental health, Briana realized it was time to make a professional shift and accepted a position with a rural outpatient mental health clinic in a neighboring county. She enrolled in the University of Rochester School of Nursing Psychiatric Mental Health Nurse Practitioner Program. This online program provided the

Bringing high-quality treatment to the region.

We are firmly committed to ensuring that Western and Central New York residents can access the same high-quality treatment programs offered in other parts of New York State and the country.

We identify partners capable of expanding the care options in our region and provide critical seed funding in the early stages of their program development. Two of these efforts, which began in 2021, are now well-established clinical programs providing new treatment options for our most vulnerable community members in Western New York.

Helping individuals take the next step.

Transitioning from inpatient care or partial hospitalization to outpatient care can be extremely challenging for patients. Long wait times for appointments and the lack of daily support can negatively impact one’s recovery and lead to readmission. ECMC recognized the need for an adaptable program that could serve as a step-down for these individuals or even a step-up from traditional outpatient programs for newly diagnosed patients.

With funding from the Lee Foundation, ECMC established an Intensive Outpatient Program (IOP), an innovative program used successfully in other communities. The program utilizes various treatment methods, including medications and customized counseling services tailored to each participant’s needs. The IOP provides choices while offering alternatives to inpatient hospitalization, potential reduction in length of stay for hospitalized individuals, and successful transition into community services in order to reduce potential readmission events.

Participation in the IOP lasts approximately four weeks and helps patients achieve mental stability and resume daily living in the community.

In just two years, there were a total of 194 enrolled patients (90.7% completed the program) and 1,951 IOP visits.

ECMC Regional Center of Excellence for Behavioral Health

A progressive and proactive approach to serious mental illness.



Steven M. Silverstein, PhD

On average, serious mental illnesses, such as schizophrenia and related conditions, occur in 1 out of 100 people. To put the ratio into perspective, that’s equivalent to more than 700 fans at every sold-out Buffalo Bills game. These diseases are also among the costliest and most disabling due to treatment expenses and lost income for patients and family members. Tragically, patient lifespans are also 15 to 30 years shorter.

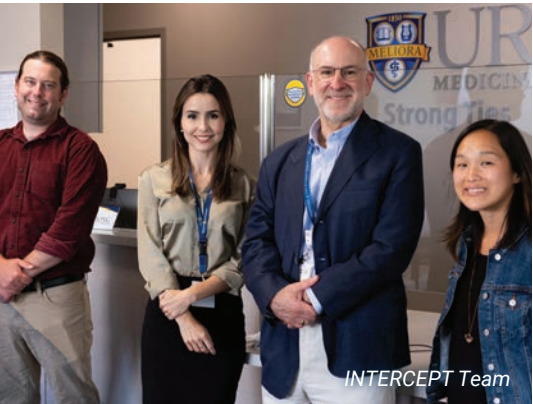
Our current mental health system is often reactive (providing care after a crisis or serious symptoms develop) rather than proactive (providing care to prevent a crisis or manage early symptoms). This is especially evident when considering treatment options for people who are at risk of developing serious mental illnesses. Intensive treatment is often provided only after an episode of psychosis or a hospitalization. However, that does not need to be the case.

In an effort to provide opportunities for preventative care and intervention, we partnered with the University of Rochester Medical Center to create a first-of-its-kind mental health clinic for Upstate New York.

INTERventions for Changes in Emotions, Perception, and Thinking (INTERCEPT) is an early-intervention Clinical High-Risk program for people at high risk for the imminent development of psychotic disorders.

Led by Steven M. Silverstein, PhD, the program provides specialized care for individuals 15 to 28 years old who present with the earliest signs of what may develop into a serious mental illness. Because these conditions impact the attainment of goals in school, work, relationships, and independent living, the clinic’s ability to intervene early is key and can dramatically impact the course of treatment and quality of life.

Based in Rochester, INTERCEPT also serves Buffalo and Syracuse. The program’s wraparound services help patients and families forge strong support systems — which can be the difference between an illness advancing or not.



INTERCEPT Team

Advocating for system-wide change.

To meaningfully impact the mental health care system, we must be staunch advocates at the regional and federal levels. We have built a network of like-minded partners and are engaged in regional and national initiatives that ensure our community’s voice is represented.

NATIONAL ADVOCACY WORK

In collaboration with Peg’s Foundation, Scattergood Foundation, and the Peter & Elizabeth C. Tower Foundation, we commissioned a series of solutions-oriented federal policy papers titled Think Bigger Do Good. An advisory council of recognized national mental health and addiction care experts, including strategic and tactical experts, informs the policy papers. The council provides input on the prioritization of topics, selection of authors, and strategy to promote effective advocacy.

In 2023, the initiative produced two papers focused on the ongoing impact of the pandemic on children and families.

- » What About the Kids? Child and Adolescent Crises, the Pandemic, and 988
- » Promoting the Mental Health of Parents and Children by Strengthening Medicaid Support for Home Visiting

NEW YORK STATE INITIATIVES

At the state level, we’ve collaborated with the National Alliance for Mental Illness (NAMI) to educate individuals living with mental illness (and their families) on accessing mental health programs, such as housing. As a member of the NY Funders Alliance, we established the Behavioral Health Initiative to connect philanthropic partners who share our interest in addressing the pressing mental health issues impacting New Yorkers.

In Western New York, we serve on the Erie County Mental Health Subcommittee and the Erie County Mental Health Crisis Response Committee. Our role is to create and foster opportunities for shared learning between our network of national experts and the dedicated professionals working in our community.

Directors and Committees.

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2023 scholarships and grants.

TOTAL DISTRIBUTED
\$3,107,968

Education Focus Area – \$700,010

Engineering Scholarships – \$525,000 (55 Scholars)

Clarkson University
Rensselaer Polytechnic Institute
Rochester Institute of Technology
Saint Louis University
Syracuse University
University of Rochester

STEM Scholarships – \$129,000 (31 Scholars)

Alfred State College
Canisius University
Monroe Community College
SUNY Erie
SUNY Niagara

Distinguished Lee Scholar Awards – \$46,010 (2 Scholars)

Mental Health Focus Area – \$1,832,958

Workforce Recruitment, Training, and Retention – \$617,936

BestSelf Behavioral Health: Clinical Internship Program
Catholic Charities of Buffalo: Strengthening the Mental Health Workforce to Reduce Barriers to Accessing Services
Christian Counseling Ministries of WNY: Strategic Training & Retention Initiative for Clinicians
Compeer Buffalo: Creating a Pipeline for the Mental Health Workforce
Compeer Rochester: Direct Service Staff Counseling and Support
Crisis Services: Staff Wellness
Envision Wellness WNY: Recruit, Train, Retain Counselors for Patients with Serious and Persistent Mental Illness
Family and Children's Service of Ithaca: CARES: Clinician Advancement and Retention through Enhanced Supports
Jericho Road Community Health Center: Behavior Health Internship Pilot Program
Jewish Family Services of WNY: Improving Mental Health Care through Support for Providers
OLV Charities: Outpatient Mental Health Clinic Investment Program

Scholarships – \$632,147 (30 Scholars)

Canisius University: Clinical Mental Health Counselor Program
Daemen University: Masters of Social Work Program
University at Buffalo Jacobs School of Medicine and Biomedical Sciences: WNY Medical School Scholarship Program – Psychiatry
University Psychiatric Practice: Psychology Doctoral Internship Program
University of Rochester: Family Psychiatric Mental Health Nurse Practitioner Program

Programs, Services, and Family Supports – \$432,875

ECMC Foundation: Creating Innovative Outpatient Behavioral Health Programs to Fill Gaps in Care
ECMC Foundation: Trauma Center and Emergency Department Capital Campaign
University of Rochester Medical Center: INTERCEPT Clinical High Risk Program

Community Outreach and Education – \$150,000

International Documentary Association: Committed Documentary

Discretionary/Other – \$575,000

The Patrick P. Lee Foundation is a private foundation committed to achieving immediate and measurable impact in the areas of education and adult mental health.

We envision a community where individuals achieve economic self-sufficiency without experiencing undue financial burden.

Our vision for people living with mental illnesses is that they are engaged and supported members of the community.



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