



**nami**

THE NATION'S VOICE ON MENTAL ILLNESS

*Partnerships  
for Recovery*

Annual  
Report

2003

MESSAGE FROM OUR PRESIDENT  
AND EXECUTIVE DIRECTOR

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“Dear Mr. President: ...  
America’s mental health service delivery  
system is in shambles ...”

—*Michael F. Hogan, Ph.D., Chairman,  
President’s New Freedom Commission on Mental Health,  
October 29, 2002*

Just six months after President George Bush launched his New Freedom Commission on Mental Health, the Commissioner’s interim report echoed NAMI’s own views, reinforcing our strategic course of action to influence the political and public will essential to transform mental health care in America. The lives of those we represent depend upon such a revolution.

NAMI, the Nation’s Voice on Mental Illness, continues to follow seven key strategic goals around which all of our board policies and staff activities revolve. NAMI’s eight staff teams, each guided by a board committee, hold responsibility for one or more of these critical and ambitious objectives.

The work detailed in this annual report reflects our resolve to drive the local, state and national debate on mental illness system reform, strengthen our nationwide network of state and affiliate organizations, increase the public commitment to mental illness and community integration by combating stigma and discrimination and four additional goals as outlined in NAMI’s strategic plan.

On behalf of the National Board of Directors and staff, we invite you to continue reading about NAMI resolve and planning, which developed into formidable endeavors. Endeavors such as the launching of our national Child and Adolescent Action Center and NAMI’s Policy Research Institute (NPRI), expanded Consumer and Family education and outreach, solidification of the NAMI Leadership Institute supporting long-standing and emerging state and affiliate leaders, and our hugely successful NAMIWALKS for the Mind of America event, initiated in 12 sites from coast-to-coast.

Annual reports offer both a synopsis of an organization’s recent past accomplishments and a glimpse of what must yet be attained. Certainly, until we realize the day when mental illness is no obstacle to a full life, we will continue to strive to transform mental health care in America.

Please share in our remarkable progress this past year and in our aspirations for next year.



Richard C. Birkel, Ph.D.  
*Executive Director,*  
NAMI National



James (Jim) P. McNulty  
*President,*  
NAMI National Board of Directors

## Public Policy

NAMI continued its role as the Nation's Voice on Mental Illness in the realm of federal legislative advocacy. Major highlights included continuing collaboration with Senator Domenici (R-NM) on legislation named in honor of the late Senator Wellstone to require health plans to cover treatment for mental illness on the same terms and conditions as all other illnesses, the provision of input to President Bush's New Freedom Commission on Mental Health, and support of efforts in Congress to complete the doubling of the medical research budget at the National Institute of Mental Health (NIMH), bringing funding for mental illness research at NIMH to nearly \$1.4 billion in FY 2003.

Additionally, NAMI helped develop the Bush Administration's initiative to end chronic homelessness in the next decade (known as the "Samaritan Initiative"), supported legislation in Congress to add a prescription drug benefit to Medicare, advocated for legislation to infuse resources into jail diversion and other programs for offenders with mental illnesses, and worked on a variety of legislative initiatives impacting children and adolescents with mental illnesses.

NAMI established the Child and Adolescent Action Center to focus greater attention on crises that face families when their child has one or more mental illnesses.

The NAMI Policy Research Institute (NPRI) was established to drive national, state and local debates on reforms and investments in the nation's mental illness delivery and financing system. The NPRI brings together policymakers, advocates and scientists through various forums to develop solutions and expand support for science-based, recession-proof treatment and recovery systems. The NPRI also provides technical assistance to NAMI state and local affiliates on pivotal issues such as access to medications, health insurance parity, and increasing funding.

## Education, Training and Peer Support Center

To improve treatment outcomes, people living with and recovering from mental illness must have access to emerging science-based practices. NAMI's peer education and support programs, whether originating at the national, state, or local level, have become a driving force in demonstrating the vital role of peer-focused program participation and leadership in recovery.

The national NAMI Family-to-Family Education Program, now in 45 states and the District of Columbia, has led the way in gaining recognition as an acknowledged evidence-based practice. Now available in Spanish, the program is expanding rapidly into Latino communities, welcoming new members, teachers and trainers into the NAMI family.

The NAMI Provider Education Program trains family members, consumers and mental health providers to teach line staff in community mental health centers. In 18 states these teaching teams are changing the attitudes and practices of providers in state systems toward more compassionate and collaborative care.

The Assertive Community Treatment (ACT) Technical Assistance Center at NAMI continues to recognize consumers and families as key service providers, and supports NAMI advocates across the country in their efforts to sustain the fidelity of this evidence-based treatment program.



*NAMI Spanish Family to Family Training in El Paso, TX.*

**Office of Consumer Affairs**

In May 2003, all national consumer programs and projects were consolidated into one team, the Office of Consumer Affairs (OCA). This team serves as a 'one-stop shop' for NAMI state organizations and local affiliates. Combining Peer to Peer, In Our Own Voice, NAMI C.A.R.E., and Hearts and Minds along with OCA activities around leadership development, ensures a more coordinated and effective organizational structure to meet the needs of NAMI at all levels regarding consumer issues.

NAMI members living with mental illnesses are increasingly involved throughout the organization in the areas of support, education, governance, and advocacy. Leadership development has emerged as a driving focus of NAMI, particularly related to the work of OCA. In the last year, OCA provided technical assistance to 10 state NAMI organizations working to establish or expand state level Consumer Councils.

Peer to Peer, NAMI's successful, experiential learning program for people with serious mental illness who are interested in wellness and recovery, continued to expand. Peer to Peer is now operational in over 21 state organizations.

Hearts and Minds, a new educational program, was recently developed and designed to address aspects of physical health as well as mental health. Hearts and Minds is scheduled for implementation in five pilot sites during fiscal year 2003-2004.

In Our Own Voice, considered by many to be one of the most effective public anti-stigma education initiatives in the United States, also saw significant growth over the last year. Over 1,700 presentations have been made across the country, reaching 30,000 individuals through the efforts of NAMI members living successfully with mental illness. A Spanish-language version for the Latino community is a priority for the coming year.

The NAMI C.A.R.E. peer support group model is in demand. Because providing support is foundational for NAMI, the importance of providing the best training and ongoing technical assistance is paramount.



*Group photo from the Peer to Peer Train the Trainers event held June 6-8, 2003, in Providence, RI.*

**Multicultural and International Outreach**

During the last year the NAMI Multicultural and International Outreach Center (MIO) has rapidly become an active voice in the diverse communities mental health arena at a national and international level. This year, NAMI MIO organized two important events in order to build new partnerships and alliances to confront the mental health crisis in communities throughout the United States and the world.

On the national front, NAMI MIO held its second annual minority mental healthcare symposium in Minneapolis, MN during NAMI's Annual Convention. The American Indian and Alaska Native communities were the focus of this year's all-day symposium, which included information on history and culture, mental health research, substance abuse, trauma, outreach and other mental health issues.



NAMI MIO also sponsored the Ninth Annual Latino Behavioral Health Institute Conference in Universal City, CA and held the first Instituto de Liderazgo de NAMI (NAMI Leadership Institute) during this event. Forty-five NAMI Latino leaders from across the country came together to learn from each other and to draft a plan of action for 2004.

MIO's goals for the next year include the organization of an African-American mental health event, forming and putting into action a NAMI MIO Partner Coalition, involvement in a health awareness campaign launched by Univision, and ongoing efforts to ensure that all Americans have access to mental health treatment and services.

## Development

NAMI's Development Team worked to expand NAMI's base of programming support from foundations and government agencies, while maintaining and building relationships with corporate donors. Additional focus was placed on individual charitable giving through such avenues as direct mail, the Internet and workplace giving.

Working with the national Board of Directors, the Development Team recast NAMI's Foundation and set into place a vibrant and vital entity to support NAMI's mission. The Foundation, supported by a newly formed, exceptional advisory council, began efforts to shape and resource NAMI's Campaign for the Mind of America.

NAMI launched its first ever national signature event, NAMIWalks for the Mind of America. A resounding success, 12 walkathons were held in May, from Portland, Maine to Portland, Oregon and raised almost \$1.2 million. Because of the overwhelming success of the program, NAMI is expanding the walkathon program to approximately 40 cities across the country in May 2004.

Over the next year, NAMI will boost efforts to diversify funding and address new strategic goals through the promising Mind of America Foundation and its advisory council, continued outreach to individual and corporate supporters, NAMIWalks, and grants work.



*The NAMI National Team pauses for a photo at the completion of the NAMI Maryland Walk in May 2003.*

## State Relations

The success of NAMI's mission depends on the knowledge, skill, energy, and effectiveness of thousands of key NAMI leaders in communities across the country. The NAMI State Relations team, through its Regional Directors and other professional staff, provide consultation, training, and coaching to NAMI leaders in 52 NAMI State Organizations and—in partnership with NAMI state leaders—for thousands of affiliate leaders.

Highlights of this year's activities include solidification of the NAMI Leadership Institute, designed to enhance our leaders' ability to govern, manage, teach, and advocate; development of Affiliate Leadership Toolkits and training events; launch of the NAMI Campus Affiliate Initiative aimed at expanding NAMI's presence with university students and faculty; and completion of a Needs Assessment and organizational health inventory that will be used to target resources for greatest impact. NAMI's goals are accomplished through the development of relationships with the grassroots and through facilitated strategic planning sessions, organizational restructuring, leadership development and training, individualized coaching, and board development.

## Communications & Marketing

Whether assisting the policy team with news releases and media work related to mental health legislation, or publishing the NAMI Advocate magazine, Communications and Marketing has positively influenced the public awareness and perceptions of people living with mental illness and their families.

Communications and Marketing has developed a broader array of multi-media opportunities and products to enhance the initial launch of NAMI's Campaign for the Mind of America. The campaign emphasizes the need to dramatically improve access to treatment, particularly among young Americans. It emphasizes the positive outcomes associated with early diagnosis and treatment, access to a full range of evidence-based practices, including appropriate medications and community-based supports such as

supported employment and housing.

The new look of the NAMI Web site, [www.nami.org](http://www.nami.org), offers a vast array of up-to-the-minute information on mental illness and the news, treatments, research, consumer empowerment, and peer support, including on-line forum communities. NAMI's Web site is updated daily with cutting-edge news and current events.

NAMI's 24<sup>th</sup> Annual Convention was held in Minneapolis in June 2003. More than 2,200 attendees from all over the United States, including more than 400 consumers, and international partner representatives from other organizations, joined in the exciting four days of workshops, networking and multi-media presentations.



*Convention attendees stop in NAMILand for a demonstration of the new NAMI Web site.*

### Governance Team

NAMI's Governance Team has dedicated itself in the last year to supporting NAMI's vision through strengthening organizational structures and processes. Much as mental disorders should pose no barrier to a person's experience of a life filled with family, friends and the security of home and employment, neither should the challenges of managing a non-profit entity distract NAMI leaders from their "real" work on behalf of people living with mental illness. The Governance Team has been dedicated to clarifying governing obligations and assisting NAMI leaders in fulfilling their commitments.

NAMI's strategic planning process continues to offer opportunities to engage all NAMI leaders in

planning for and achieving thoughtful organizational change. As the first phase of NAMI's five-year plan closes, the next phase is taking shape with input from across the NAMI organization. NAMI is proud of the dialogue that has accompanied planning in the last year. Many of the achievements detailed elsewhere in this report reflect the impact of the planning and governance partnership to build a strong, self-reliant, nation-wide NAMI organization.

#### Our Vision:

*Mental illness is no obstacle to a full life.*

#### NAMI's Mission:

*NAMI is dedicated to the eradication of mental illnesses and to the improvement of the quality of life of all whose lives are affected by these diseases.*

NAMI's Development Task Force, chaired by Jim McNulty, was one among three task forces to make recommendations to NAMI's 2004-2005 Strategic Planning process. Task Force members came from across the country, from state organizations and local affiliates, both large and small, to make targeted recommendations in areas of concern to NAMI members and leaders.



*Seated: Frank Jose, Jim McNulty, Bill Quinn; Standing: Lynn Borton, Joleen Bagwell, Blair Young, Bettie Reinhardt, Rick Birkel, Grace McAndrews, Lynne Montgomery-Hernandez, and Laurie Dalton.*

## LEADERSHIP ALLIANCE MEMBERS

(as of June 30, 2003)\*

NAMI wishes to recognize our esteemed Leadership Alliance members, donors who have contributed annual gifts of \$500 or more. We want to express our appreciation to each of them for their commitment to NAMI.\*

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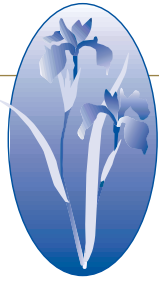
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(as of June 30, 2003)

NAMI wishes to recognize our esteemed Iris Circle members, donors who have expressed their commitment to extend their support into the future through a planned gift in their will or trust or through a life income gift--a charitable gift annuity or charitable remainder trust.\*

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Maxine Baker  
George and Harriet Baldwin  
C. William and Shirley Bales  
Sophie Ball  
Gerald P. Barry, Jr. and Jane Barry  
Donald and Irene Beaucage  
Walter Becker  
Thilo and Betsy Best  
Joseph Birhanzi  
Marjorie Blanchard  
Bessie Blond  
Peggy Brenner  
Dori Bretscher  
Elizabeth Brewer  
Dr. Patrick Bryan and  
Mrs. Mary Bryan  
Darla Bull  
Joyce Burland, Ph.D. and  
Sascha Burland  
Dr. Jerome Byers and  
Mrs. Hazel Byers  
Mervin and Harriett Caninzun  
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Lois Carruth  
Margaret Carver  
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Patricia Warburg Cliff, J.D.  
and Karl Von Frieling  
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Norman Dahl  
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Mr. James England  
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Jack Ferguson, Ph.D.  
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Mrs. D'Anne Holley  
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Mary Hotz  
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Irving and Beatrice Malman  
John Manning  
Allan McCall  
Diana McCall  
James and Susan McHugh  
Nina McTague

## CURRENT IRIS CIRCLE MEMBERS

(as of June 30, 2003)

Thomas and Martha McVerry  
Janice Meredith  
John and Louise Mihalek  
Dr. Gary Mihelish and  
Mrs. Sandra Mihelish  
Maynard and Flora Mobley  
Henry B. Mohr  
Fern Momyer  
E. A. Morgan  
Ruth Morrow  
Joanne Moskal  
Jill H. Nagorniak  
Ingrid Neat  
Michael Neusch  
Nancy Orbison  
Dimitra Pavlik  
Elizabeth Peters  
Virginia Phelps  
Marny Philips  
Sophie Posner  
John and Dolores Quaal  
Rev. John R. Ramsey  
Randolph Family Trust  
Erwin and Grace Rausch  
Eunice Rea  
Louise Reiman  
John and Irene Rodden  
Jeannette Rosa  
Patricia Rutledge  
Sharon Roth  
Emanuel Rotter  
Fred Sandoval  
Paul Schad  
James and Shelah Scott  
Sylvia Schneider

Shirley Schoenfeld  
Jacqueline Shannon  
Susan Shore  
Eileen Silber  
Richard Sjostrom  
Harley and Cody Splitt  
Shari Steinberg and Alan Harley  
Myron and Janet Susin  
Jean Sweeney  
Dr. Samuel Tabbat and  
Mrs. Berta Tabbat  
Dr. Thomas Tatlock and  
Mrs. Andrea Tatlock  
Mr. and Mrs. James Thompson  
Myra Trachtenberg  
Dr. George Tregaskis and  
Mrs. Patricia Tregaskis  
Alfred and Rochelle Vener  
Rev. Gordon Ward and  
Mrs. Lois Ward  
Elizabeth Webb  
Dr. Peter Weiden and  
Mrs. Vicki Weiden  
Rose Weiss  
Bernard and Frances White  
Dr. Kerr White  
Steven and Catherine White,  
White Family Trust  
Robert Wiener  
John and Betty Wills  
Dorothy Winkler  
Walt and Charlotte Wirfs  
Lorna H. Wissink  
Sylvia Wubnig  
Frank and Ann Zingheim  
Richard and Barbara Zuegel

\*If your name should be listed here and is not, please let us know so we can provide you with the recognition your commitment so richly deserves. We would also like to take this opportunity to thank our Iris Circle members who choose to remain anonymous.

## THE NAMI HONOR ROLL

The NAMI Honor Roll recognizes those special friends who have remembered NAMI with their ultimate gift, their final bequest.

Estate of  
Edward Reeves Black



Estate of  
Ernest Brunner



Estate of  
Eleanor Himmelstein



Estate of  
Edward C. Schreiber

**THE MANY BEAUTIFUL MINDS  
ENDOWMENT**

**LEAD DONOR**

**Lucile Rogers Orbison Memorial Fund**

Funded by:  
Estate of Lucile Rogers Orbison  
Nancy Orbison

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The Donald Daves  
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The Kenneth Johnson  
Memorial Fund

Randolph Family Fund

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Eva Christine Dobbins  
Fund

The Douglas Keith  
Macpherson Memorial  
Fund of NAMI

Janet and Myron Susin

**GENERAL ENDOWMENT FUND**

Anonymous Donor

Joseph Hinshaw

NAMI's StigmaBusters

Robert and Martha  
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John and Irene Rodden

Fredrick Sandoval

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Jane Barry

Stewart and Irene Hutt  
Heather Killough

James and Shelah Scott

Thilo and Betsy Best

Josephine and  
Robert Lyon

Dr. Peter Weiden and  
Mrs. Vicki Weiden

Luisa Francoeur

Lorna H. Wissink

Larry and Beverly  
Hinman

Dr. Gary Mihelish and  
Mrs. Sandra Mihelish

Frank and Ann  
Zingheim

Jill H. Nagorniak

**How to Give to NAMI's Many Beautiful Minds Endowment:**

**Pledge Online:** [www.nami.org](http://www.nami.org)

**Contact Development:**

Winsome Clarke  
703.516.7992  
[winsome@nami.org](mailto:winsome@nami.org)

Linda Radcliffe  
703.516.7970  
[lindar@nami.org](mailto:lindar@nami.org)

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Foundation

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Foundation

Van Ameringen Foundation

Wyeth Pharmaceuticals

# NAMI AND SUPPORTING ORGANIZATION

## COMBINED STATEMENT OF FINANCIAL POSITION AS OF JUNE 30, 2003

### ASSETS

#### CURRENT ASSETS

Cash and cash equivalents (Note 6)	\$ 1,708,658
Investments (Note 2)	1,720,589
Accounts receivable	278,587
Pledges receivable	1,455,855
Inventory	27,060
Prepaid expenses	189,935

<u>Total current assets</u>	<u>5,380,684</u>
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#### PROPERTY AND EQUIPMENT

Land	64,300
Equipment	1,715,037
Furniture	45,145
Leasehold improvements	745,960

Less: Accumulated depreciation and amortization	2,570,442 (1,125,283)
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<u>Net property and equipment</u>	<u>1,445,159</u>
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<b>TOTAL ASSETS</b>	<b><u>\$ 6,825,843</u></b>
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### LIABILITIES AND NET ASSETS

#### CURRENT LIABILITIES

Accounts payable and accrued liabilities	\$ 1,098,462
Deferred rent (Note 6)	76,197
Charitable gift annuity (Note 11)	10,994

<u>Total current liabilities</u>	<u>1,185,653</u>
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#### LONG-TERM LIABILITIES

Deferred rent (Note 6)	419,086
Charitable gift annuity (Note 11)	18,001

<u>Total long-term liabilities</u>	<u>437,087</u>
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<u>Total liabilities</u>	<u>1,622,740</u>
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#### NET ASSETS

Unrestricted	2,320,313
Temporarily restricted (Note 3)	2,475,782
Permanently restricted (Note 5)	407,008

<u>Total net assets</u>	<u>5,203,103</u>
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<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b><u>\$ 6,825,843</u></b>
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# NAMI AND SUPPORTING ORGANIZATION

## COMBINED STATEMENT OF ACTIVITIES AND CHANGE IN NET ASSETS FOR THE YEAR ENDED JUNE 30, 2003

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
<b>REVENUE</b>				
Individual contributions	\$ 2,312,085	\$ -	\$ 87,526	\$ 2,399,611
Foundation contributions	233,499	303,531	-	537,030
Corporate contributions	4,027,411	1,646,175	-	5,673,586
Contracts	211,623	356,390	-	568,013
Affiliate membership	425,323	-	-	425,323
Combined federal campaign	84,202	-	-	84,202
Associate and agency membership	83,469	-	-	83,469
Conference	348,887	-	-	348,887
Sales, net of cost of goods sold of \$34,700	120,414	-	-	120,414
Other program revenue	230,127	-	-	230,127
Interest and dividend income	67,057	-	-	67,057
Realized loss	(1,104)	-	-	(1,104)
Unrealized gain	39,148	-	-	39,148
Net assets released from donor restrictions (Note 4)	2,333,892	(2,333,892)	-	-
<b>Total revenue</b>	<b>10,516,033</b>	<b>(27,796)</b>	<b>87,526</b>	<b>10,575,763</b>
<b>EXPENSES</b>				
Program services:				
Research	341,774	-	-	341,774
Program and Member Support	3,218,411	-	-	3,218,411
Education	5,044,106	-	-	5,044,106
Advocacy	56,581	-	-	56,581
<b>Total program services</b>	<b>8,660,872</b>	<b>-</b>	<b>-</b>	<b>8,660,872</b>
Supporting services:				
Administration	1,333,431	-	-	1,333,431
Fundraising	858,652	-	-	858,652
<b>Total supporting services</b>	<b>2,192,083</b>	<b>-</b>	<b>-</b>	<b>2,192,083</b>
<b>Total expenses</b>	<b>10,852,955</b>	<b>-</b>	<b>-</b>	<b>10,852,955</b>
Change in net assets	(336,922)	(27,796)	87,526	(277,192)
Net assets at beginning of year	2,657,235	2,503,578	319,482	5,480,295
<b>NET ASSETS AT END OF YEAR</b>	<b>\$ 2,320,313</b>	<b>\$ 2,475,782</b>	<b>\$ 407,008</b>	<b>\$ 5,203,103</b>



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