



2011 – 2013 Strategic Plan

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NAMI 2011 – 2013 Strategic Plan

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Executive Summary

Outgrowths of the previous strategic plan's goals, NAMI's 2011 – 2013 strategic goals reflect organizational continuity as well as a desire to propel NAMI to even greater heights.

- 1. NAMI is a dynamic and well-run organization.**
- 2. NAMI is financially secure and independent.**
- 3. NAMI is the leading voice in mental illness advocacy nationally and at the state and local levels.**
- 4. NAMI offers state-of-the-art education and information.**
- 5. NAMI seeks out, listens to and engages people of diverse perspectives and experiences in ways that are inclusive, respectful, relevant and responsive.**

Rather than a traditional strategic plan that is static and determined at one point in time for implementation at often much later points in time, NAMI has adopted an approach that requires us to articulate our organizational values and competitive advantages and then use that information to test new ideas as they come forth. We call the resulting tools our "strategic screens". They allow us to screen – or test and assess – each idea before we decide to move forward with it. In this way, we maintain the consistency of a carefully constructed strategic vision but allow ourselves greater flexibility to respond to opportunities and challenges as they arise. Each year, the Strategic Plan will be further articulated through specific, measurable and accountable objectives and actions.

NAMI's Strategy Formation

NAMI builds better lives for the millions affected by mental illness. From staggering stigma, to woefully inadequate treatment options and utterly failed systems of care, the depth and breadth of the injustices associated with mental illness are daunting and wide-reaching. When working for systems changes that improve the lives of people affected by mental illness, NAMI must be especially agile and strategic, making best use of the limited and precious resources available.

Like the constituency we serve, NAMI's well-being depends on our resiliency and ability to remain adaptable in the face of an ever-changing environment. NAMI seeks to support and reinforce resiliency throughout the organization by cultivating skills and habits that help us be the best organization we can be with the resources available to us.

In that spirit, NAMI undertakes strategic planning on a regular basis. Strategic thinking does not stop with the generation of a plan. Rather, NAMI seeks to cultivate a culture of continuous strategic decision-making that is values-driven and enlarges and enhances our competitive advantage.¹

Mission and Identity Statement

NAMI enjoys a reputation as “the nation’s voice on mental illness.” We make that reputation real on a daily basis, both as the largest grassroots advocacy organization addressing mental illness and as the way people whose lives have been affected by mental illness find their individual and collective voice.

NAMI's bylaws begin with the following Preamble, which serves as our mission statement:

NAMI recognizes that the key concepts of recovery, resiliency and support are essential to improving the wellness and quality of life of all persons affected by mental illness. Mental illnesses should not be an obstacle to a full and meaningful life for persons who live with them.

NAMI will advocate at all levels to ensure that all persons affected by mental illness receive the services that they need and deserve, in a timely fashion.

In an informal survey on Facebook, NAMI fans most often chose one word to describe NAMI – *hope*. NAMI represents the belief that the injustices that currently surround

¹ NAMI's 2010 planning process was based on David LaPiana's model of “real-time strategic planning” which stresses building organizational competitive advantage through strategic decision-making on an ongoing basis. [*The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World \(2008\)*](#).

mental illness are neither inevitable nor insurmountable. NAMI strives to epitomize the very concepts of recovery and resiliency that it supports: we are empowered, holistic, strength-based, respectful, responsible, and person-centered. Above all, NAMI represents hope.

History, Background & Business Model

From our inception in 1979, NAMI has been dedicated to improving the lives of individuals and families affected by mental illness. As the nationally-recognized nerve center of a network of local affiliates and state organizations, NAMI harnesses the considerable passion of thousands of local volunteers who are dedicated to transforming America's experience and understanding of serious mental illness.

Much of the energy of our organization emanated from the desire of families to seek treatment, services and a better quality of life for loved ones too ill to advocate for themselves, and to advocate for research into the causes and cures of mental illnesses. As the years passed, families were increasingly joined in advocacy by those who live with an illness.

NAMI's support and public education efforts focus on educating America about mental illness, offering resources to those who need and seek them, and insisting that mental illnesses become a national priority.

NAMI offers an array of peer education and training programs, initiatives and services for individuals, families, health care providers and the general public. NAMI's education and support programs provide relevant information, valuable insight, and the opportunity to engage in supportive networks. These programs draw on the "lived experience" of families and individuals who have learned to live well with mental illness and who have been extensively trained to help others. NAMI and volunteer grassroots leaders are committed to education as the pathway to recovery, empowerment and wellness.

NAMI is the preeminent voice on Capitol Hill and in state houses across the country for the millions of Americans living with serious mental illness. NAMI advocates have fought for policy changes that raise the bar on mental illness care and promote treatment and research on par with other illnesses. NAMI's advocacy provides a uniquely credible voice in the development and implementation of state and federal public and private-sector policies that facilitate research, end discrimination, reduce barriers to successful life in the community and promote timely, comprehensive and effective mental health services and supports. NAMI and grassroots leaders work steadily to influence critical national policy debates as they unfold.

Begun first as a loose federation of a few like-minded local groups seeking a national presence for federal-level advocacy, NAMI has grown to incorporate chartered State

Organizations and hundreds of local Affiliates. Through the NAMI Standards of Excellence, we seek to strengthen organizational operations and build brand awareness.

Impact NAMI is Seeking to Achieve

NAMI seeks transformation: personal transformation for those who live daily with the impact of mental illnesses, as well as systemic transformation that significantly improves the way people affected by mental illnesses are viewed, treated and served in every community in the country. Research, prevention, early intervention, recovery, resiliency and support are key to the transformation NAMI seeks.

NAMI's Competitive Advantage

In our planning, NAMI seeks to develop and carry out a coordinated set of actions designed to create and sustain our competitive advantage. NAMI's competitive advantage is multifaceted – the whole almost certainly greater than the sum of its parts. NAMI is not the only organization dedicated to supporting people whose lives have been affected by mental illness. Our continued preeminence depends on our ability to distinguish ourselves from others. That distinction rests on NAMI's unique capacity to engage people with mental illnesses and their families directly in ways that help transform lives and build self-advocacy while demanding dignity, effective treatment and sustained support.

NAMI's competitive advantages are deeply rooted in our organizational values. In our ongoing strategic decision-making, NAMI will turn to these values and make choices that build or enhance our competitive advantage. By holding ourselves to the fine edge of these advantages, NAMI can stay true to our values, effect substantial organizational change and strengthen our appeal to funders, members, supporters, and the general public.

Education & Support

Education and support have been at the heart of NAMI efforts since our founding. NAMI's competitive advantage in these areas is directly linked to members' personal experiences with mental illness. As people who live with a mental illness, or who are their families, colleagues, friends and neighbors, NAMI members bring their "lived experience" with them when they provide support and education. This "lived experience" permeates NAMI's education and support offerings. The camaraderie of this shared experience, and recognition of the biological basis of mental illness, offers validation and normalization to situations that are all-too-often sources of devastating isolation. This is a perspective that service-provider or treatment-provider organizations cannot offer.

Simply having walked this path does not ensure that someone is an effective teacher or mentor for others. NAMI's competitive advantage depends on our ability to provide continuously improving and evolving training and skills building for teachers, trainers, mentors and facilitators.

NAMI defines support and education broadly, to encompass everything from face-to-face weekly support groups led by trained facilitators, to web-based interactive content available on demand anywhere in the world. NAMI's competitive advantage is our reliance on an ever-improving stable of high quality educational programs and content that takes advantage of rapidly evolving communication and dissemination channels.

NAMI is dedicated to providing universally accessible support and education. This means that NAMI programs must be offered to the people who need them and they must be offered in formats that enhance availability. That requires the utilization of various telephonic and web-based formats as well as development of programs that are culturally and linguistically accessible to a vast range of audiences and that employ a diversity of learning and teaching styles.

And finally, NAMI's competitive advantage in education and support derives from the message of hope that all of our strength-based programs and initiatives provide.

Advocacy

NAMI's competitive advantage in advocacy is grounded in our credibility as an authentic voice of our "lived experience" that speaks with no other motive than the improvement in the lives of people affected by mental illnesses through system change and medical research. Our credibility is enhanced by the depth of our community penetration and our ability to mobilize large numbers of constituents as well as key strategic allies. NAMI must be careful to protect this reality and reputation.

In training, resourcing, and mobilizing grassroots leaders and members, we enhance NAMI's competitive advantage by cultivating additional skilled advocates across the country.

No other organization provides the rigorous, comprehensive, and hard-hitting assessment of the state of publicly funded mental health services found in NAMI's *Grading the States*. NAMI must continue to publish and disseminate data-driven mission-focused advocacy that challenges failures in mental health care systems wherever they arise. These challenges will be especially significant as federal parity and health care reform are implemented; NAMI must continue to confront those challenges head-on.

NAMI is a leader in advocating for increased federal funding for the National Institute of Mental Health and SAMHSA. This advocacy for research into the causes and treatment of mental illnesses is a vital hallmark of NAMI's work and success.

NAMI has and must retain our well-earned reputation for crafting smart and strategic legislative priorities. As "the nation's voice on mental illness," NAMI reinforces our competitive advantage by demonstrating our willingness to use the power and influence we have earned.

Recovery & Resiliency

As America's largest organization dedicated to meeting the needs of people who live with mental illness, NAMI is uniquely positioned to promote broad acceptance of recovery and resiliency.² NAMI must enhance this competitive advantage by incorporating principles of recovery and resiliency in all our programs and materials.

NAMI considers recovery an active process or journey, not a passive destination. NAMI builds competitive advantage by supporting people in learning who they are and helping them to use their skills to become all they are meant to be.

Many able and effective organizations are dedicated to recovery and resiliency and NAMI can build our competitive advantage by forming strategic partnerships with those whose expertise complements our own. NAMI must serve as a strong ally in the battle against the cruel stigma of low expectations, and we need not attempt the fight alone.

With the broad spectrum of life experiences represented within NAMI, we provide a unique venue for open and informed discussion of the recovery journey. Many NAMI members and people they care about have yet to experience "recovery" in the way it has been described. As advocates for those who are most ill and most at risk, NAMI must provide a forum for exploration of those experiences and validation for all journeys, regardless of their place on the recovery spectrum. NAMI's competitive advantage is enhanced by our ability to encompass and embrace the entire spectrum.

NAMI uniquely addresses and embraces the broad spectrum of experiences for those whose lives are affected by serious mental illness. We recognize that every journey is different and we maintain an optimistic, hopeful attitude, confident that with natural and professional supports, engaging in effective treatments and self-help, an increased belief in themselves and a sense of self-empowerment, those with even the most severe mental illnesses can achieve mental wellness.

² NAMI uses "recovery" consistent with the [SAMHSA](#) definition, including the following principles or approaches: self-direction, individualized and person-centered, empowerment, holistic, non-linear, strength-based, peer support, respect, responsibility, and hope.

Inclusion

NAMI has significant competitive advantage as a “big tent” under which both consumers and families can feel comfortable, offering a rare opportunity for larger discussions and partnership that do not pit one point of view against another. NAMI must enhance its competitive advantage in this regard by ensuring the full and meaningful integration of consumers in every facet of the organization.

Mental illnesses are equal opportunity illnesses that are not bound by race, age, gender, socio-economic status, culture, sexual orientation, geography, language or diagnosis. NAMI’s competitive advantage depends on our ability to be similarly encompassing. NAMI must seek and secure ways to be relevant in the lives of people from very diverse communities and walks of life.

NAMI members’ compassion for others whose lives have been disrupted by mental illness is boundless. This empathy is a competitive advantage that flows out of NAMI’s willingness and ability to offer support and resources. NAMI’s culture of self-help and support is viable in every community. NAMI’s competitive advantage comes from seeing people as people first.

NAMI insists upon outreach to and full inclusion of diverse experiences and perspectives because it is the right thing to do – and because our future depends on it. Our competitive advantage is reinforced by our continuing willingness to enter into sometimes challenging conversations and wrestle with the consequences of long-standing distrust or alienation. NAMI can further enhance this competitive advantage by seeking the help of diverse constituencies in meeting these needs, rather than insisting that we already know what is required or that we can do it all alone.

NAMI’s Strategic Screens

Organizations employ all manner of criteria for decision making. Sometimes the rationale is explicit and widely-understood and sometimes it is arcane and laden with organizational intrigue. In our strategic planning process, NAMI sought to be absolutely transparent and thoughtfully specific about the criteria it would use in selecting among the many attractive ideas and strategies that arise to compete for NAMI time, attention and limited resources.

Rather than a traditional strategic plan that is static and determined at one point in time for implementation at often much later points in time, NAMI has adopted an approach that requires us to articulate very clearly our organizational values and competitive advantages in order to create a tool that uses those insights for testing new ideas as they come forth. In this way, we maintain the consistency of a carefully constructed

strategic vision but can couple it with greater flexibility to respond to opportunities and challenges as they arise. We call this tool our “strategic screen”. It allows us to screen – or test and assess – each idea before we decide to move forward with it.

NAMI has constructed two screens that position organizational values and competitive advantage as the lynchpins for decision-making. In building and using the screens, we impose a disciplined consistency on the coming years’ decision-making, even as we remain agile and responsive to changing realities. The screens will become an integral part of both board and staff decision-making going forward, building a culture of intentional and strategic planning on an on-going or “real-time” basis.

Values-Driven Strategic Screen

NAMI’s screens are built upon NAMI’s mission and values. They are grounded in NAMI Standards of Excellence, which describe the mutually agreed upon standards of operation for NAMI, NAMI chartered State Organizations and NAMI Affiliates.

The screen assists us in making values-informed strategic choices. They help NAMI determine *why* we would undertake any given idea and *how* we would shape and refine the idea in order to hold or enhance NAMI’s competitive advantages and ensure strong management.

Simply put: if we test an idea against this screen and cannot provide clear and satisfactory answers to the questions posed in the screen, then we ought not pursue that idea. While the idea or program may have many merits and be appealing, if it does not support NAMI’s mission and values and enhance our competitive advantage then, as leaders dedicated to advancing NAMI’s strategic well-being, we must refrain from those actions.

In some rare cases, ideas or strategies that cannot be reconciled with the screen may be pursued, but only after a full exploration of the import of and documentation of that decision. The goal here is to ensure that we are aggressive in our assessment of opportunities and challenges and always make choices consistent with our organizational values.

Strategic Management Screen

NAMI is determined to implement successful strategies and make well-considered choices in allocating limited and valuable resources. NAMI will use the following management screen to assess and strengthen each programmatic initiative under consideration.

NAMI Values	<p>NAMI’s Four Pillars: Support, Education, Advocacy and Research Does it support or advance these four pillars? How can it be refined to do so even more?</p>
	<p>Give Voice To, Validate, and Draw Upon Our “Lived Experience” as Families, People Living with Mental Illness, and Their Friends? Does it draw upon and reflect our lived experience? How can it be refined to do so even more?</p>
	<p>Confront the Profound Injustices Associated with Mental Illness Does it confront the injustices that surround mental illness? How can it be refined to do so even more?</p>
	<p>Build Upon Emerging and Best Practices Does it capitalize on emerging and best practices? How can be it refined to do so even more?</p>
NAMI’s Competitive Advantages	<p>Advocacy Does it protect and maintain NAMI’s credibility as an authentic advocacy voice with no ulterior motive? Does it project NAMI’s power in an effective and meaningful way? Does it position NAMI as a strong strategic partner? Does it achieve significant grassroots penetration? Does it include training, tools, and skills building to enhance members’ advocacy skills? How?</p>
	<p>Education and Support Does it further our commitment to provide education and support, broadly defined? Does it support universal accessibility (free, on the web, available in multiple languages, culturally relevant)? Is it delivered by trained people with lived experience? Is it responsive to changing market and audience needs and various learning styles? Is it strength-based and does it project hope? How?</p>
	<p>Recovery and Resiliency Does it reflect and increase the credibility and visibility of the principles and ideals of recovery and resiliency? Does it offer a venue for informed discussions of the broad spectrum of experiences of recovery and resiliency? Does it recognize that no everyone has yet experienced “recovery”? How?</p>
	<p>Inclusion Does it reflect NAMI’s dedication to diversity and inclusion? Does it promote open conversations that engage and respect diverse perspectives? Does it reflect NAMI’s culture of empathy? Does it engage diverse perspectives in planning, development, implementation and evaluation? Is it relevant in the lives and communities it is intended to serve? How?</p>
Management	<p>Specificity What are the clear and unambiguous goals?</p>
	<p>Achievability Can it be done? Can it be done well? Is it better done in partnership? With whom?</p>
	<p>Resourcing What does it cost (time, money, staff)? Where will funding come from? What are the opportunity costs? Is it of sufficient importance to replace other existing activity? Do we have sufficient staffing and/or available expertise to do this well? Do we have sufficient time to accomplish program goals?</p>
	<p>Measurement What is our baseline? What outcomes are we seeking? Are they measurable? What are our metrics for measuring progress? How can they be made more specific and meaningful?</p>
	<p>Capacity Building Does it build capacity at NAMI, NAMI State Organizations and NAMI Affiliates? Does it address capacity needs at NAMI, State Organizations and NAMI Affiliates? How?</p>
	<p>Field Resonance Does it have resonance, credibility or meet a need in State Organizations and Affiliates? Does it meet a need in NAMI State Organizations and Affiliates? How will we address any resistance we might encounter?</p>
	<p>Sustainability What are our plans for continuation beyond initial funding? Do we have identified funding streams? Who will carry on the program?</p>
	<p>Organizational Stretch How does it help NAMI grow, strengthen or provide for continuous self-improvement?</p>

NAMI's 2011 – 2013 Strategic Goals

NAMI's Strategic Screens codify the underlying values and competitive advantages that will drive activity in the coming years. They provide essential consistency while offering flexibility as NAMI pursues its major goals for 2011 – 2013.

The goals for the coming years are well-rooted in the previous plan's strategic priorities. While we are understandably proud of the work and accomplishments of recent years, we see opportunities for further advancement in each area and look forward to shaping yearly priorities to achieve these goals:

- 1. NAMI is a dynamic and well-run organization.**
- 2. NAMI is financially secure and independent.**
- 3. NAMI is the leading voice in mental illness advocacy nationally and at the state and local levels.**
- 4. NAMI offers state-of-the-art education and information.**
- 5. NAMI seeks out, listens to and engages people of diverse perspectives and experiences in ways that are inclusive respectful, relevant and responsive.**

In each goal area, NAMI has identified organizational strategies that will be pursued in support of the goal. Organizational strategies help NAMI garner resources of all kinds to achieve our goals. Programmatic and operational strategies focus on increasing programmatic impact and enhancing administrative efficiency, preparedness and execution. NAMI places particular importance on aligning programmatic and operational strategies with the overall organization strategies to ensure their interactions aren't counterproductive.

Each year, staff teams develop work plans and budgets for accomplishing these organizational strategies, using NAMI's strategic screens to refine and strengthen planning. Those work plans establish the specific metrics, benchmarks and accountability called for in any strategic plan.

NAMI's Strategic Management Screen becomes particularly important at this point, as it is the tool that ensures accountability in implementation. Plans and attendant budgets are submitted for Board review and approval in anticipation of each new fiscal year. For each quarterly Board meeting, the Executive Director provides progress reports that reflect the specificity, achievability, resourcing and outcomes measurement of each effort.

GOAL 1: NAMI is a dynamic and well-run organization.

Organizational Strategies:

- Implement NAMI Standards of Excellence.
- Develop and maintain effective information technology systems and services to support organizational needs.
- Define and clarify membership goals and supporting systems.
- Develop a marketing and communications plan that advances and promotes NAMI's core goals, based on consistent organizational messaging.
- Increase diversity, cultural competence and outreach technical assistance, planning, training opportunities and resources for the field.
- Cultivate and leverage strategic partnerships.
- Focus on clearly articulated and measurable outcomes.

***When we say "Dynamic"
we mean:***

*responsive to change,
energetic, proactive,
continuously improving,
innovative*

GOAL 2: NAMI is financially secure and independent.

Organizational Strategies:

- Secure funding to accomplish NAMI's strategic priorities
- Ensure that resources are dedicated to NAMI's strategic priorities
- Develop successful collaborative shared fund raising models with NAMI State Organizations and NAMI Affiliates.
- Diversify and balance funding sources.
- Develop NAMI, NAMI State Organizations and NAMI Affiliates as fund raising organizations.

GOAL 3: NAMI is the leading voice in mental illness advocacy nationally and at the state and local levels.

Organizational Strategies:

- Grow NAMI's membership.
- Engage affected constituents in effective and timely advocacy and policy development.
- Train members for self-advocacy.
- Increase NAMI's focus on disparities in mental health care in diverse communities.
- Continue as a major national presence and voice at federal, state and local levels to ensure funding and implementation of legislative priorities including: parity, health care reform, access to adequate and appropriate services, housing, peer services, elimination of disparities and access to basic services.
- Develop capacity and tools for advocacy and communication between NAMI, NAMI State Organizations, and NAMI Affiliates.

- Be proactive in promoting legislation to accomplish NAMI's objectives.
- Focus on key populations, including: underserved, aging, children and transitional aged youth, veterans and active military, people who are homeless and have a mental illness, and those currently residing in institutional settings (jails, state hospitals, long term care facilities).
- Ensure integration of mental health and physical health care for people living with mental illness across the lifespan.
- Cultivate and leverage strategic partnerships.
- Advocate for appropriate information technology and communications systems to connect people who live with mental illness and providers to treatment and services for the purposes of achieving positive recovery and holistic outcomes.

GOAL 4: NAMI offers state-of-the-art education and information.

Organizational Strategies:

- Engage target audiences in program planning, development and evaluation.
- Model what are or can be best and emerging practices in educational and informational programming.
- Help people to develop skills for self-advocacy and empowerment and train others to do so.
- Ensure communications are effective for target audiences.
- Cultivate and leverage strategic partnerships to promote and disseminate mental illness education and information.
- Expand NAMI's social media outreach.
- Construct and operate programs as opportunities for membership growth.

When we say "State-of-the-Art" we mean:

evolving with changing market needs, highest level of development, cutting edge engaging, recognizing cultural differences, using new technology & communication strategies

GOAL 5: NAMI seeks out, listens to and engages people of diverse perspectives and experiences in ways that are inclusive, respectful, relevant and responsive.

Organizational Strategies:

- Engage the National Consumer Council in new and increasingly meaningful ways.
- Promote and demand full consumer integration.
- Promote and demand cultural competence in all activities from the outset, never as an "add on" or afterthought.
- Acknowledge and address internal stigma.
- Cultivate and leverage strategic partnerships representing diverse communities.

When we say "Diverse" we mean:

age, gender, socio-economic status, sexual orientation, disability, language, lived experience, ethnicity, geography, race, culture