

# **NAMI's 2007 - 2010 Strategic Plan**

## **Charting Our Course from Good to Great**



**Adopted by  
NAMI National Board of Directors  
March 2007**

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## **A Letter from the NAMI Board**

As we began drafting our 2007 - 2010 Strategic Plan, we gathered input from internal and external stakeholders. One of the external participants said, quite plainly, "NAMI is the only group that really cares about serious mental illness—and you always will." No truer words were ever spoken. Our dedication to our mission - eradication of mental illness and improvement in the quality of life for people who live with mental illness - is as strong now as ever. As recovery, and the tremendous hope that it represents, becomes not just a possibility but a probability, we continue to push for more and better treatments—for a cure—not resting until we reach all whose lives have been affected by serious mental illnesses. We are ever mindful of those whose illnesses are the most severe and needs the greatest.

The Board was pleased and proud to present its draft plan for members' comment and input. We invited members to join us in Town Hall calls, online, and via email to share their reactions and thoughts. We hope members and leaders will see evidence of their input in this final version. Scores of members joined us for our calls and sent comments. We thank all who participated in that dialogue: our final plan is stronger and clearer for your efforts.

No strategic plan can address the entire work of an organization. This document, while highlighting key initiatives for the next three years, should not be read as the sum of all of NAMI's many marvelous parts. Critical work continues, often outside the limelight. For example, our exemplary signature support, education, and training programs continue to be critical to our mission and service; we continue to provide a wealth of information and resources and services on the Web, in print, and through our wonderful toll-free HelpLine; our tenacious federal advocacy on such issues as parity and access to services flourishes. This plan does not attempt to specify all the particulars of implementation, rather it provides a brief view of the plans proposed. We look forward to members' continued engagement, suggestions and recommendations as we develop the operational plans that will make this vision real.

Reality was very much on our minds as we considered this plan. We sought to craft a plan that is genuinely achievable - while demanding that we stretch ourselves to accomplish its goals. We know all too acutely the importance of ensuring adequate resources to support implementation and you will see reference to those initiatives that we recognize will require new infusions of staff and/or dollars.

In this plan, we have turned our attention to strengthening NAMI's core. We understand that to be successful in the long run, we must invest in our infrastructure, both with time and money. We pay particular attention to our health as a grassroots membership organization. We build on the success we have achieved in recent years. The Multicultural Action Center and our Child and Adolescent Action Center, both created as part of our previous strategic plan, have become integral parts of the NAMI "whole" and serve as models for future activity. Through them, we have learned the great value of interdisciplinary work, of policy and program developed in concert. Consequently, this plan puts specific emphasis, for instance, on meeting the needs of Veterans and the importance of NAMI's increased attention to the systems of care for our military service personnel.

NAMI cannot accomplish all that we hope without the help of others. Even as we seek to be the dominant force in serious mental illness advocacy, we understand the importance of strategic partnerships with others who share our goals. We have made great strides in this respect in recent years and we hold these new relationships in great regard. We celebrate the successes they have brought and will continue these collaborations.

We dedicate ourselves to growing NAMI in number and in strength. We will do this through effective member cultivation and retention, and purposeful outreach into under-served communities. We will change the face of NAMI, not by abandoning who we are, but by becoming more diverse to reflect the nation around us. When we speak of *diversity*, we include race, ethnicity, age, gender, sexual orientation, disability, families with children with a serious mental illness, and the unique needs of rural, frontier and border communities. Serious mental illness has a profound impact in these communities, and so must NAMI.

Most importantly, of course, we cannot accomplish all that we hope without each other. As the nation's largest family and consumer organization in our field, we have a special duty to succeed. If not NAMI, then who? Throughout these pages you will see evidence of our commitment to work collaboratively, across all levels of the organization, to make our alliance the best we can be. We will work to build organizational structures that "make sense on the ground" and that facilitate our work. In the "active listening" that led to this final plan, NAMI's grassroots called for clarity in these areas and pledged to work collaboratively to this end. We will ensure the strength of NAMI at the State and Affiliate level as we move forward.

Within this plan are exciting visions of our potential realized. Please continue to join us in this work. We look forward to your involvement!

*The NAMI National Board of Directors  
March 10, 2007*

## Executive Summary

NAMI has made a commitment to greatness. Through our strategic planning process, we have dedicated ourselves to moving from being a good, solid organization, to one that is truly great. By “great” we mean that *NAMI will deliver superior performance that makes a distinctive impact over a long period of time.*

To achieve greatness, we have selected five goals that can apply equally well to NAMI at the national, state and local levels and on which we will focus our efforts for the next three years:

- 1. NAMI is a dynamic, well-run organization that seeks and engages a diverse and growing membership.**
- 2. NAMI is financially secure and independent.**
- 3. NAMI is the dominant force in serious mental illness advocacy.**
- 4. NAMI is the leader in crafting and implementing state-of-the-art education and information.**
- 5. NAMI is building and incorporating the largest consumer movement in the country.**

We have selected these goals because they express what *must be true* for NAMI to move from good to great.

We will approach our goals keeping in mind the essential elements of progressing from good to great: finding, keeping and nurturing disciplined people; demanding of ourselves disciplined thought; and taking only disciplined action. We understand discipline in a positive light—not as punitive or constraining—but as the force that will set NAMI free to achieve success. In that light, we have identified a limited list of strategies that we will use, across all our goals, to ensure our path to greatness. We will achieve our goals and greatness by:

- **Increasing and diversifying funding at all levels**
- **Making NAMI a household word**
- **Confronting failures**
- **Describing and promoting best practices**
- **Increasing training and learning opportunities**
- **Embracing and empowering leaders and members from diverse communities**
- **Embracing and empowering consumer leaders and members**
- **Embracing and empowering families of children and youth.**

The strategies we will use to reach our goals represent the *choices we make* about *how* we will achieve our goals. The substance of NAMI’s strategic plan lies at the intersection of our goals and these strategies.

Our goals and strategic choices dictate continuation of many of NAMI’s existing initiatives, refinement and redirection of others, and creation of a select few more. For each goal, we have identified key initiatives that serve as result measures against which we can monitor our forward movement.

# NAMI's 2007- 2010 Strategic Plan

## *Charting our Course from Good to Great*

NAMI is dedicated to the eradication of mental illnesses and to improving the quality of life for all whose lives are affected by these illnesses. Through support, education, advocacy, and research, NAMI serves the nation and our communities by empowering consumers and families to confront the profound injustices brought by serious mental illness. Through this strategic plan, we chart a course to meaningful systems change and the promise of recovery.

### Background

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The NAMI Strategic Planning Group (SPG), a representative group appointed by the Board and charged with drafting NAMI's strategic plan, convened first in March 2006, engaging in a now well-established NAMI tradition of "active listening" to gather members' input and ensure that the NAMI planning process remained inclusive, interactive and iterative.<sup>1</sup>

Active Listening began in the spring and reached its greatest level of activity at the NAMI Convention, when members were able to complete surveys, attend special "listening sessions", networking sessions' concerns were recorded, and NAMI's Advisory Councils held special meetings and teleconferences to offer additional input.

The SPG met for its initial planning retreat in August, for a three-day facilitated session that yielded the proposed plan's goals and strategies and revealed the need for more time to align the plan with NAMI's budget process, to allow more informed decision-making based on cost projections.

The theoretical framework for the plan, based on Jim Collins' work *Good to Great*, proved even more compelling and constructive than the SPG had anticipated. Since the retreat, Board members and NAMI leaders at the Affiliate and State levels have been introduced to the "good to great" framework, which permeates the plan document.<sup>2</sup>

SPG's work was reported to the National Board in September. Board members were engaged in an "active listening" session of their own as they recommended elements that they felt would be critical to NAMI's progress over the next three years.

In November, the SPG convened again and wrestled with the task of narrowing their brainstorming to a few key efforts that best reflected the goals and strategies already identified, and against which NAMI's progress from good to great could be measured.

The SPG offered its draft to the Board in early December. The Board reviewed, refined and accepted the SPG's work as NAMI's Draft 2007 - 2010 Strategic Plan and then sought members' input. A "public comment" phase ran from December 2006 through February 2007. The Board reviewed all comments, revised the plan based on that input, and approved the final plan in early March 2007.

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<sup>1</sup> See Appendix I for mission and composition of NAMI's Strategic Planning Group (SPG)

<sup>2</sup> Jim Collins *Good to Great and the Social Sectors*, 2005.

## NAMI's Strategic Vision

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NAMI has made a commitment to greatness. Through our strategic planning process, we have dedicated ourselves to moving from being a good, solid organization, to one that is truly great. By “great” we mean that *NAMI will deliver superior performance that makes a distinctive impact over a long period of time.*

Five years from now, we envision NAMI as a great organization characterized by clarity, vitality, visibility, stability, and strength in our infrastructure, funding, advocacy, and education efforts. We will find and remain steadfast at the intersection of our passion (our profound rejection of the injustices created by serious mental illness) with our greatest strength (our unique ability to articulate both the experience of those injustices and of recovery through our advocacy, education and programs) and our resources (NAMI's remarkable volunteers and staff, our funding, and the NAMI brand).

As an expression of our envisioned future, we have selected five goals that can apply equally well to NAMI at the national, state and local levels and on which we will focus our efforts for the next three years:

1. NAMI is a dynamic, well-run organization that seeks and engages a diverse and growing membership.
2. NAMI is financially secure and independent.
3. NAMI is the dominant force in serious mental illness advocacy.
4. NAMI is the leader in crafting and implementing state-of-the-art education and information.
5. NAMI is building and incorporating the largest consumer movement in the country.

We have selected these goals because they express what *must be true* for NAMI to move from good to great.

Throughout the planning process, discussion returned to ensuring that NAMI be “real on the ground”—that time and resources be dedicated to strengthening, empowering and supporting NAMI at the Affiliate and State levels, with particular attention to needs of NAMI's in rural, frontier, and border communities. “Being real on the ground” also requires attention to the needs of our local Affiliates and the importance of branding NAMI, our products, and our services, and building the organization's visibility overall. These priorities find expression throughout the plan and, even when not explicitly mentioned, should be assumed as underlying premises in all NAMI undertakings: we are as strong as our smallest support group and we dedicate ourselves to strengthening the entire NAMI “family”. Ultimately, all our work will depend on adequate resources—hence our first goal and recurring emphasis on the importance of ensuring financial strength at all levels of the NAMI organization.

## Realizing Our Vision

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We will approach our goals keeping in mind the essential elements of progressing from good to great: finding, keeping and nurturing disciplined people; demanding of ourselves disciplined thought; and taking only disciplined action. We understand discipline in a positive light—not as punitive or constraining—but as the force that will set NAMI free to achieve success. In that light, we have identified a limited list of strategies that we will use, across all our goals, to ensure our path to greatness. We will achieve our goals and greatness by:

- Increasing and diversifying funding at all levels
- Making NAMI a household word
- Confronting failures
- Describing and promoting best practices
- Increasing training and learning opportunities
- Embracing and empowering leaders and members from diverse communities
- Embracing and empowering consumer leaders and members
- Embracing and empowering families of children and youth.

The strategies we will use represent the *choices we make* about *how* we will achieve our goals. The substance of NAMI's strategic plan lies at the intersection of our goals and these strategies.

We selected these particular strategies because they reinforce important work already underway (engaging diverse communities, consumers, and families of children and youth), as well as build on approaches that have proven successful in recent years (teaching ourselves and one another to face the hard facts if efforts that aren't as successful as might have been hoped, and identifying and articulating better approaches).

First and foremost, we must ensure our viability by strengthening funding at all levels of the organization. *Increasing and diversifying funding at all levels* will make us less vulnerable to the vagaries of any particular funder's interest and enable us to provide more and better programs and services. This strengthening must be realized at all levels of the organization, but especially on the local level where NAMI existence can be unremittingly "hand to mouth."

We understand the importance of building the NAMI "brand" by *making ourselves a household word*. We will do this through unrelenting advocacy, pro-active marketing/outreach, and providing only the highest caliber of programming, publications, and training. Every strategic implementation will serve to build the NAMI brand and increase our visibility nationwide.

The *Good to Great* framework emphasizes the critical and strategic value of brutal honesty in the face of daunting facts. We embrace the strategy of *confronting failures* both in our external demands for systems change, as well as in our internal assessment of our own shortcomings. We will not flinch from the realities before us, nor will we shy from holding ourselves and others accountable for the failings we see.

Simply pointing out what is wrong or inadequate is, in itself, an inadequate approach. For this reason, we will couple our *confronting failures* strategy with *describing and promoting best practices* and *increasing training and learning opportunities* to offer viable alternatives to current failed systems. We will enrich and enhance capacity within the organization not simply for its own sake, but to ensure we cultivate a grassroots leadership that is genuinely equipped for greatness.

NAMI's 2001 – 2006 Strategic Plan placed a newfound emphasis on multicultural outreach, cultural competence, and inclusion of families of children and youth. These efforts proved to be more than simple window-dressing and have set into motion a radical transformation of the face of NAMI. In this plan, we will continue this exciting and important momentum, further imbedding these efforts in absolutely every element of NAMI programming and advocacy. Our last strategies, then, demonstrate our rededication to these efforts as we work to *embrace and empower members and leaders from diverse communities and families of children and youth*. And, finally, the same is true for growing our consumer membership. Always an integral part of the NAMI "family", we will continue to offer

increasingly relevant and meaningful ways to engage and empower new consumer members and leaders.

As we move to implement our goals and strategies, NAMI will draw on the power of its own history, as well as on the power of new opportunities before us. Our rich history as a person-first movement, which took shape first as a family organization concerned primarily with adults with severe and persistent mental illnesses who shared a profound interest in research, is equally relevant today. We enhance our heritage with increasing attention to the needs of children and youth, recognizing what science has told us about the impact of early onset and the importance of early intervention.

We rejoice in the expanded engagement of consumers in NAMI because it is evidence of recovery and the resilience we know to be possible, even as some individuals and families still struggle with illnesses so pernicious that currently available treatments are utterly insufficient. Our dedication to meeting the needs of these individuals—and to supporting the research to overcome existing limitations or even to find cures—is unswerving. NAMI serves families—parents, siblings, spouses, children of people who live with serious mental illnesses, and those individuals themselves—across the lifespan, with full appreciation for the varying but equally valid experiences every member brings to the lived experience of serious mental illness within the family.

We embrace the success of new approaches, such as the NAMI Walks, to draw new members and fresh attention to NAMI and the impact of serious mental illness. Our NAMIWalks program, which has evolved to be a remarkable multi-faceted asset to the entire NAMI movement, offers important lessons: program templates that brand NAMI in the community have tremendous structural value; we can—and do—attract thousands of new members, volunteers and donors to our cause; organizational capacity building, membership growth and funding raising can—and do—happen all at once, with a little effort. Web-based programs and technology also hold breathtaking possibilities for NAMI. The NAMI Web site and Web-based programs and services are already proving to be critical public conduits to NAMI's wealth of information and offerings. We will build on what our experience has taught us works.

## **Progressing from Good to Great**

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In the planning process, NAMI's need for baseline data for many goals became very apparent. Throughout the plan, establishing a baseline is often the first implementation effort identified for action. We recognize and embrace the organizational and administrative challenges inherent in accomplishing these baselines, especially in an entrepreneurial grassroots organization such as NAMI. In our public comment phase, these challenges were often remarked upon. Particularly in light of the needs in the field, we are committed to providing the resources and systems to support this information gathering and ongoing measurement. From baselines, we can make genuine measures of progress. Without them, we can only speculate.

We recognize that some of our work is measurable in quantitative ways, while other portions are more subjective and rely on qualitative assessments. Either way, we will hold ourselves accountable to demonstrable progress. We will rigorously collect evidence to evaluate our progress, wherever we may find it.

Our goals and strategic choices dictate continuation of many of NAMI's existing initiatives, refinement and redirection of others, and creation of a select few more. For each goal we have identified key

initiatives that serve as result measures against which we can monitor our forward movement. We have selected measures that address outcomes and outputs, rather than simply tallying inputs.

This document does not contain the implementation work plans that will operationalize this strategic vision. Those plans will come annually, in conjunction with NAMI's annual budgeting process. Narrative attached to each initiative helps provide the Board's thinking and context for selection and may hint at implementation options or preferences, but is in no way exhaustive. It is the Board's role to determine annual priorities and to approve and oversee the budget that will make attaining these goals possible. Public comment and input from NAMI's Advisory Councils help inform this process.

The selected initiatives contained in this plan are chosen because we view them as critical to our success—critical to our movement toward greatness—and because progress in these areas is measurable in ways that will be meaningful as we move through implementation. Ideally, these efforts are SMART (specific, measurable, achievable, realistic, and time-limited). To ensure continuous performance improvement, we will employ several of our own strategies as we move forward: we will confront our own failures or short-comings, employ best practices, and capitalize on our learning experiences. In evaluating our efforts, we seek to be our own greatest critic.

Ultimately we will judge our work against whether it genuinely moves NAMI toward greatness: *how effectively do we deliver on our mission and make a distinctive impact, relative to our resources?*

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# Goal 1

**NAMI is a dynamic, well-run organization that seeks and engages a diverse and growing membership.**

## ***NAMI's Envisioned Future***

NAMI is a thriving organization, characterized by clarity, vitality, stability and strength.

NAMI is truly inclusive and welcomes members from all walks of life, and from across the lifespan. NAMI attracts and retains more members, from increasingly varied communities, and is genuinely representative of our nations' great diversity. We enjoy a vibrant and entirely culturally competent and linguistically appropriate presence in African-American, Asian-American/Pacific Islander, Native American, Native Alaskan, and Latino/Hispanic communities all across the country.

We have collaborated thoughtfully to define standards for our organizational operations. We cultivate a culture of healthy interdependence between NAMI at the National, State and Affiliate levels. All facets of NAMI function freely, within a framework of clearly articulated roles and responsibilities. We have succeeded in creating organizational structures that are wholly viable even in rural and frontier communities.

We seek and recognize excellence among our own ranks, as well as avail ourselves of best practices in organizational management and leadership development. We face with honesty our own organizational shortcomings and develop strategies to address them so that we may move "from good to great."

## ***Realizing the Vision***

NAMI's strategic plan is our expression of how we hope and expect to get to our envisioned future. In looking at the intersections of this goal and our strategies, we pay particular attention to efforts that will help NAMI deliver superior performance as an organization, that will have a distinct impact within the organization, and that can endure within the ever-changing world of a lively and growing grassroots movement.

In working toward this goal, NAMI will focus particularly on incorporating these strategies:

- confronting failures;
- describing and promoting best practices;
- increasing training and learning opportunities; and
- embracing and empowering leaders and members from diverse communities, consumer leaders and members, and families of children and youth.

This goal requires that we look systemically and address first the fundamentals of good organizational management. We place this goal first because we view success here as primary and sequentially essential to success elsewhere.

## ***Progressing from Good to Great***

NAMI's need for a baseline for this goal underscores the importance of data gathering and confronting the current challenges in our organizational structure. Recognizing that without sound organizational structures, we cannot hope to succeed in our other goals. We will address these "infrastructure issues" first. These are not the most exciting elements of our plan, but we view them as among the most strategic.

We will measure our progress through these initiatives:

### **A. NAMI is increasing membership by 10% per year.**

- **Task: establish membership baseline**
- **Target: 10% growth each year**
- **Evidence of Progress: increasing velocity of new membership growth; improving capacity of organization to manage membership; improving member retention**

*NAMI's potential membership is enormous—as is our possible attendant power—yet, for a variety of reasons, we lack a full grasp of our current membership numbers. Getting a firm hand on the true scope of NAMI's membership count has always challenged this three-tier, grassroots, membership organization. Leaders at all levels have given clear indication that they are ready to grapple with this challenge, allowing NAMI to establish common membership structures and a baseline from which growth can honestly be measured. Access to and comfort with using information and Web-based technology will have to be taken into account as NAMI develops membership data systems that can be used at all levels of the organization.*

### **B. The NAMI organization is jointly defining, implementing, and functioning within agreed-upon standards of operation.**

- **Target: establish baseline of operating standards at all levels, including basic non-profit requirements and best practices, by 2008**
- **Target: timeline for implementing standards established by 2008**
- **Target: timeline and process for rechartering established by 2008**
- **Task: collect membership's cultural, ethnic, and geographic data**
- **Evidence of Progress: increasing number and percentage of States and Affiliates adhering to standards; documenting organizational growth and increasing well-being as a result of adherence to standards; documenting development of standards**

While essential to our mission and history, NAMI's entrepreneurial, grassroots structure has presented unique challenges for our organizational growth. NAMI recognizes that the best solutions to these challenges will come from collaborative thinking and that "one size won't fit all." The standards we develop must accommodate variety and be appropriate for NAMI groups at various stages of development, and in urban, suburban, and rural/frontier/border settings. Leaders at all levels have expressed desire to resolve lingering role confusion and ambiguity, so that organizational energy can be saved for NAMI's true passions—support, education, advocacy and research. NAMI will invest the resources necessary to help the grassroots meet these agreed-upon standards.

### **C. NAMI is operating a Veteran's Action Center.**

- **Task: development or work plan, staffing, annual budget**
- **Target: formation of Center in 2007**

- **Target: establish strategy for reaching out to service personnel returning from Iraq and Afghanistan, and their families**
- **Evidence of Progress: advocacy increasingly visible and having demonstrable impact; increasingly effective Veterans Council engagement; NAMIs increasingly engaging with VA and needs/concerns of veterans**

*NAMI recognizes both the tremendous need among veterans for the services and supports available from NAMI—and the huge membership potential represented by the ten million military veterans in this country. Building on the success of other NAMI Action Centers, the Veteran’s Action Center is expected to help grow the organization both in numbers and in the scope of its reach and impact.*

**D. NAMI is conducting periodic assessments of key organizational indices.**

- **Task: identify indices and organizational health assessment tools**
- **Task: document performance of assessments**
- **Task: include cultural competence assessment among indices**
- **Evidence of Progress: positive progress on indices**

*Documented “best practices” in non-profit business operation offer numerous assessment tools for measuring institutional health and for managing organizational risk. NAMI will avail itself of these instruments and conduct periodic evaluation of our operations with an eye toward continuous improvement. These assessments will be periodic, rather than annual, to reduce any disruptive burden to State Organizations and Affiliates. Their performance will be geared to constructive engagement and be approached as learning opportunities for leaders and the organization alike. The tools and indices employed will be shared across the organization so State Organizations and Affiliates may select the instruments most helpful to them in conducting their own self-assessments.*

**E. NAMI is increasing involvement and leadership of diverse populations at all levels.**

- **Task: establish baseline of cultural, ethnic, and demographic membership data**
- **Evidence of Progress: increasing active participation and assumption of leadership roles**

*NAMI must represent the communities in which we exist. Achieving a diversity that genuinely reflects the community will require purposeful effort, including seeking and identifying emerging leaders, membership recruitment and retention efforts, development of culturally appropriate resources and materials. In speaking of diversity, we include race, ethnicity, age, gender, sexual orientation, disability, families with children with a serious mental illness, and the unique needs of rural, frontier and border communities. We will pay particular attention to providing culturally competent and linguistically appropriate programs and resources in African-American, Asian-American/ Pacific Islander, Native American, Native Alaskan, and Hispanic/Latino communities. Success in this area can be measured objectively through demographic data collection.*



## Goal 2

### **NAMI is financially secure and independent.**

#### ***NAMI's Envisioned Future***

NAMIs at all levels have achieved financial stability, without compromise to mission or goals. Funding streams are diverse and tap unrestricted dollars for maximum flexibility. Financial support comes from increasing and increasingly diverse sources, including individuals, corporations, governmental sources, and foundations.

NAMI has developed exciting funding sources, such as the NAMIWalks, which tap new donors and dollars. Sponsorship has become commonplace for NAMI events and activities, including the existence of national non-vested-interest corporate sponsors. Potential competition between National, State and Affiliate levels of the organization has been eliminated through partnerships and clear communication.

NAMI's potential donors and funders believe not only in our mission but also in our capacity to deliver, without compromise, on that mission. National, State and Local NAMIs are—and are unequivocally perceived as being—independent of funding sources that might influence or otherwise impede our advocacy and programming. NAMIs make especially effective use of the funds available to them, demonstrating exceptional stewardship of funds.

#### ***Realizing the Vision***

Without adequate resources, little is possible in non-profits' competitive environment. Just as our infrastructure issues must be addressed, so too must our resource challenges. Financial security at the National level must be leveraged to help create comparable stability at the State and Affiliate levels. We will avail ourselves of the opportunities created by our Leadership Institute, Executive Directors' Leadership Exchange, and the newly created regional conferences to provide skills-building and technical assistance to our vital grassroots.

The intersections of our fiscal goal and our strategies are pragmatic, with particular attention to the need for equipping all levels of the organization to find and maintain stable funding streams. In working toward this goal, NAMI will focus particularly on incorporating these strategies:

- increasing and diversifying funding at all levels;
- making NAMI a household word;
- confronting failures;
- describing and promoting best practices; and
- increasing training and learning opportunities.

## ***Progressing from Good to Great***

NAMI has a well-established baseline of National funding data from which progress can be measured, but less has been documented about the funding sources of NAMIs at the State and Affiliate levels. In addition to quantifiable data, evidence of financial diversification, demonstrable fiscal stability, increasing budgets and demonstrated stewardship will be viewed as important indicators of organizational health and progress toward greatness.

We will measure our progress through these initiatives:

### **A. NAMI is increasing the diversity of direct corporate support and increasing direct mail income.**

- **Target: increase funding from direct mail, individual contributions, foundations, memorials, and major donors to 65% of total revenue by 2010**
- **Evidence of Progress: funding ratios adjusting positively; total revenues continuing to increase; potential donors are increasingly receptive to cultivation, or actively seek out NAMI**

*Securing unrestricted and diversified funding is “priority one” for NAMI. We wish to strengthen our fiscal position through a greater variety of funding sources. Direct mail represents a growth opportunity for NAMI at all levels, if done effectively. Care must be taken to address the needs at State and Affiliate levels, perhaps through partnership or other use agreements, so that one level’s gain in this area is not another’s loss.*

### **B. NAMI is developing and implementing pilot “shared” fundraising opportunities with State Organizations that have the capacity and interest in working with National on joint fundraising.**

- **Task: determine number of State Organizations with capacity and interest to undertake effort**
- **Task: track number of State Organizations participating**
- **Task: track projects undertaken and revenue generated**
- **Evidence of Progress: increasing frequency of requests for partnerships; successful outcomes from partnerships, including funds raised and positive experiences for all parties; building fund development capacity in State Organizations to expand NAMI signature programs**

*Collaboration has been the secret to much recent NAMI success, not least in fund raising. With a specific goal of increasing States’ and Affiliates’ levels of sophistication in fund development, this initiative assumes large amounts of technical assistance to the field and a long term goal of increasing National’s ability to share increasing resources with State Organizations and Affiliates. This activity will exceed current capacity and staffing of NAMI’s Center for Leadership Development and Development teams and will require additional resources.*

### **C. NAMI is seeking and securing funding from previously unidentified or new sources.**

- **Task: research and develop cultivation prospects**
- **Task: document requests**
- **Evidence of Progress: increasing familiarity with and receptivity to NAMI in new arenas; successful securing of new funding sources; Leadership Alliance membership and donations increasing**

*Diversification will also necessitate identification of new—and potentially previously unimagined—funding sources, including: foundations, new membership programs, special events, faith-based communities, increased fundraising from corporate sponsors other than pharmaceutical companies, and expansion of NAMI's Mind of America Foundation outreach. Success in this arena can be measured through documentation of cultivation, requests, and ultimate yield from these new funding sources.*

**D. NAMI is managing a growing endowment.**

- **Target: campaign to support endowment established by 2008**
- **Target: endowment reaches \$5,000,000 by 2010**
- **Evidence of Progress: donors increasingly familiar with and supportive of endowment; increasing available capital**

*Endowments are restricted dollars, but with careful management they lend an organization a critical degree of stability and permanence that NAMI desires and can reasonably expect to achieve.*

**E. NAMI National is providing technical assistance to State Organizations and Affiliates to improve their fundraising capacity.**

- **Task: establish baseline of current support and technical assistance at State and Affiliate levels**
- **Evidence of Progress: increasingly sophisticated fund development successfully employed at State and Affiliate levels; increasing fiscal stability among State and Affiliate participants**

*This initiative assumes expansion of staff and other resources to provide technical assistance and learning opportunities for State and Affiliate leaders. Through the Leadership Institute, tool kits, event templates, and consultative assistance, field leaders will be equipped to make NAMI more financially secure and independent. Fundraising will be built into the fabric of NAMI's ongoing technical assistance to States.*

**F. NAMI is increasing NAMIWalks sites by 10 each year.**

- **Task: track sites, revenue, walkers**
- **Target: increase 10 sites each year**
- **Evidence of Progress: increasing stability, participation, and revenue from all sites; demonstrated interest in participating from potential sites; penetration in major media markets**

*NAMIWalks has proven to be a remarkable source of financial independence for State Organizations and Affiliates. NAMI will expand this program to a growing number of sites.*



# Goal 3

## **NAMI is the dominant force in serious mental illness advocacy.**

### ***NAMI's Envisioned Future***

NAMI is the “go to” organization when it comes to contemplating systems change. NAMI is a force to be reckoned with in political and advocacy circles. Policy makers secure NAMI’s input before drafting public policy and politicians similarly seek NAMI endorsement and approval.

NAMI has a well-earned reputation for taking on hard battles—and winning them—and for addressing the needs of people living with serious mental illness. We are visible and formidable as we put the “human face” on serious mental illness and recovery. We demand the highest quality research and services for people with serious mental illness—and we expect them to be funded appropriately.

We reject failed “systems of care” and hold accountable those responsible for such failures. NAMI leads the way in addressing and correcting systems failures in critical areas such as employment, housing, and the “criminalization” of people with serious mental illness, finding innovative answers to problems too-long viewed as intractable by others.

NAMI has successfully integrated serious mental illness into the wider “disability community” and takes full advantage of legislation and regulations designed to assist members of this community.

NAMI State Organizations and Affiliates are well-equipped to mobilize for systems change. We provide and readily exchange tools and resources that enable members to become strong and effective advocates. We make a priority of mobilizing for change.

### ***Realizing the Vision***

NAMI National was originally founded at least in part to provide federal-level advocacy leadership. NAMI’s capacity to deliver on that charge is directly tied to the skills and resources available at the State and Affiliate levels. NAMI is unique among advocacy groups for the authenticity of our voice as service system end users. Our ability to articulate the experience of serious mental illness—its impact, as well as the consequences of failures in services, treatment, and public policy—defines our value to this public debate.

The intersections of NAMI’s advocacy goal and our strategies hone NAMI’s advocacy presence, furthering our stature as a force to be reckoned with. In working toward this goal, NAMI will focus particularly on incorporating these strategies:

- making NAMI a household word;
- confronting failures;
- describing and promoting best practices;
- increasing training and learning opportunities; and
- embracing and empowering leaders and members from diverse communities, consumer leaders and members, and families of children and youth.

## ***Progressing from Good to Great***

We will measure our progress through these initiatives:

### **A. NAMI is “Grading the States” and defining a gold standard for shaping public mental health services in the US.**

- **2006 report forms baseline**
- **Target: next report in 2008**
- **Target: develop a framework for a *Grading the States* report on children and adolescents by 2010**
- **Evidence of Progress: state policymakers (bureaucrats and elected officials) are utilizing the report’s scoring criteria as road maps in developing public mental health services; individual states demonstrate improvement in areas identified as deficient in NAMI’s 2006 report.**

*NAMI’s 2006 return to “Grading the States” proved as monumental as any might have anticipated. Policy makers, service providers, other advocates and media alike continue to reverberate to the report’s findings. Original plans to undertake the next report in 2009 have been met with a push to perform this task sooner—an important indicator of the report’s impact and import, but one which will require an even more aggressive ramp up of staff and additional funding. We will continue to make a priority of leveraging the report’s data compilation and release as learning opportunities for State and Affiliate leaders. NAMI’s grading criteria will continue to reflect organizational public policy priorities, including attention to disparities in services to communities of color and the critical importance of culturally competent and linguistically appropriate services.*

### **B. NAMI is leading a multi-faceted campaign to reduce the incarceration of youth and adults with serious mental illness in jail or prison.**

- **Task: establish baseline data (build on 2006 Department of Justice study)**
- **Task: develop and document tool kits, training, mobilization of advocates**
- **Evidence of Progress: data revealing declines in incarceration, recidivism, and appropriate diversion to services; evidence of increasing use of early intervention strategies; increase in a full range of community services including: CIT, mental health courts, ACT services, dual-diagnosis programs, crisis response teams, supported housing, vocational rehabilitation, social rehabilitation, and availability of acute care in the community, access to acute, intermediate, and long-term inpatient care when needed, and supported outpatient treatment when needed; data revealing declines in incarceration and appropriate diversion to services; existence of re-entry programs; existence of screening and assessment for youth and adults entering the criminal justice system**

*Criminalization of people who live with serious mental illness has staggering implications for both the individual and society at large. NAMI vehemently rejects this trend and will bring its advocacy force to bear in confronting this systems failure. We will demand to see substantial declines in these daunting statistics, including the alarming recidivism too often associated with people with serious mental illness. In conjunction with NAMI’s CIT and other law and criminal justice activities, this effort will provide a rallying cry for systems change.*

**C. NAMI is implementing strategies to increase and focus NIMH funding of research relevant to serious mental illness in children and adults.**

- **Target: annual budget increases, above inflation, by 2010**
- **Evidence of Progress: NIMH budget growing and increasingly focused on serious mental illness; NAMI engaging early and in meaningful ways in budgeting process**

*Research is at the heart of NAMI's mission. While huge portions of research are funded by private concerns, NIMH still plays a pivotal role in advancing our knowledge of serious mental illness. With this public funding can come improved public and Congressional understanding of the impact of scientific advances. In real dollars, the NIMH budget has declined unacceptably in recent years. We will fight this downward trend. While the political climate has changed and substantial budget increases may be harder to achieve, NAMI must not flinch from pushing a serious mental illness agenda at the NIMH. We will not fight for funds that are misspent. NAMI calls for NIMH to increase research on the long-term safety, efficacy and effectiveness of psychotropic medications for children and adolescents.*

**D. NAMI is increasing the effectiveness of its advocacy.**

- **Task: establish baseline of members' engagement**
- **Task: develop and document increasingly available tools for grassroots advocates**
- **Evidence of Progress: grassroots responding to NAMI legislative alerts with increasing frequency and fervor; increasing frequency with which NAMI is sought by Congress and Executive Branch to testify, advise, consult; public policy initiatives supported by NAMI are successful**

*NAMI's advocacy strength comes from both its federal presence and its grassroots credibility. While our historic successes are many, we must dedicate ourselves to a course of constant self-improvement as we seek, find, and use ever-more effective advocacy strategies, including use of new technologies and training and equipping members and leaders to become more vociferous and effective advocates at the local, state, and national levels.*

**E. NAMI is increasing capacity among NAMI State Organizations to exchange effective strategies for systems change for children and adults.**

- **Task: establish baseline – document existing practices via Leadership Institute, Leadership Exchange, online bulletin board**
- **Evidence of Progress: demonstrably less “re-invention of wheel”; improving mechanisms for exchange, including better use of Web-based reference and resource systems**

*As an association of State Organizations and Affiliates, NAMI has a special challenge to help leaders help themselves and others through leveraging the effort of others. Tool kits, templates, and venues for networking and exchange will be critical to this sharing. Equally important will be identification and use of effective ways to communicate the availability of these resources for a widely dispersed grassroots membership.*

**F. NAMI is leading a multi-faceted campaign to facilitate employment and financial independence for persons with serious mental illness.**

- **Target: increase focus on employment in the next *Grading the States* report**
- **Target: convene panel of experts to advise NAMI on steps that can be taken in federal and state policies to increase access to meaningful employment options for people with serious mental illness and issue recommendations from convened panel**

- **Evidence of Progress: increasing recognition within the broad disability community of serious mental illness as a legitimate disability; increasing familiarity with employment options and considerations among members; emerging strategies**

*Employment is a critical part of the path to recovery. NAMI will elevate its existing efforts by infusing an emphasis on employment throughout our federal advocacy efforts and in our policy support to State Organizations and Affiliates. Recognizing that important work is being done by others in this area, we will use our unique convening status to bring together experts in the field to inform the future course of employment advocacy.*

**G. NAMI is influencing presidential platforms and elevating serious mental illness on elected officials' agendas.**

- **Target: revive NAMI's *I Vote, I Count*. Campaign for 2008 election**
- **Target: collect and report Presidential candidates' positions on key mental health issues.**
- **Evidence of Progress: proactive serious mental illness planks included in platforms; candidates speak directly and substantively to issues; voters seek and care about candidates' views on NAMI issues; media take note and cover public interest on campaign trail**

*As an advocacy organization, NAMI must achieve high visibility for our issues and insert ourselves in the public debate at election time. As we have with the "Grading the States" report, we will continue to hold public officials accountable for the shameful state of services for people living with serious mental illness in this country.*

**H. NAMI is developing and employing a national media and marketing program that supports our advocacy voice and the NAMI brand and reflects the increasingly diverse nature of the organization.**

- **Target: integrated PSAs for radio, TV, and print piloted**
- **Target: print materials developed, including posters, brochures, and templates**
- **Target: marketing planning is available via coaching, mentoring, and training**
- **Target: best practices are identified and promoted**
- **Target: spokesperson and public speaking initiatives are operational**
- **Evidence of Progress: increasing number of thought leaders, politicians and well-known people enlisted to speak; growing number of consumer recovery stories used in public messages; increasing numbers of media exposes generated by NAMI; thought leaders perceiving NAMI as a dominant advocacy force**

*A well-crafted and expertly executed marketing strategy will play a vital role in elevating NAMI's general visibility and supporting our advocacy impact. Such a plan will—indeed, must—also serve to promote NAMI's programs and other services. This program will incorporate a multi-media campaign that involves upgrades and expansion of existing resources and introduction of new and much-sought-after components such as radio and TV PSAs. This marketing strategy will be the product of externally contracted media professionals. Such branding efforts are expensive and will require substantial resources as well as increased internal capacity.*



## Goal 4

**NAMI is the leader in crafting and implementing state-of-the-art education and public information.**

### ***NAMI's Envisioned Future***

NAMI is the first place people turn when they have questions or are seeking information about serious mental illness.

Having come to NAMI, people find exceptional educational and informational resources that meet their needs and level of interest. Our Web site, HelpLine services, print materials and education programs are second to none and are widely recognized as “state of the art”—indeed, they serve as critical components in NAMI’s increasing public and popular visibility.

NAMI’s signature education programs have a high degree of penetration in forums where family- and consumer-education are offered—and regularly expand those venues through their value and quality delivery. We seek, find, recognize and promote other excellent education and information innovations around serious mental illness in an effort to saturate the country with high quality learning opportunities.

We avail ourselves of the advantages and advances available through Web-based and telephonic technologies to speed and facilitate access to the information and education programs we provide. We have sought, found, and consistently employ highly effective program adaptations to meet the unique needs of rural and frontier communities. We unfailingly ensure cultural and linguistic appropriateness for diverse and multicultural audiences.

### ***Realizing the Vision***

NAMI’s education programs have exploded in recent years, both drawing new members to the NAMI fold and providing invaluable leadership development opportunities for the field. We are faced with the challenge of maintaining capacity in the field, however, and in finding new ways to deliver training and teaching materials. Education programs and public information make heavy resource demands which must be addressed at all levels of NAMI.

NAMI will build its brand through improved quality print and electronic materials, with special attention to developing the NAMI “voice” in print and upgrading presentation to reflect the quality of our content.

In working toward this goal, NAMI will particularly focus on incorporating these strategies:

- making NAMI a household word;
- describing and promoting best practices;
- increasing training and learning opportunities; and
- embracing and empowering leaders and members from diverse communities, consumer leaders and members, and families of children and youth.

## ***Progressing from Good to Great***

NAMI is rightly proud of its current education and information efforts and has a substantial body of data on the success of each. The challenge going forward—in getting from good to great—will be in documenting and improving efficacy and expanding programs to meet continuing and growing needs, especially in underserved populations such as in multicultural communities and with families of children and youth, and in capitalizing on new technologies for effective, and cost-effective, content delivery.

We will measure our progress through these initiatives:

**A. NAMI's signature programs are demonstrating their positive impact on promoting recovery and expanding consumer and family empowerment through incorporation of research components.**

- **Target: evaluation and efficacy assessment research component incorporated in every signature program by 2010**
- **Evidence of Progress: State Organizations and Affiliates experience improving receptivity to programs due to established efficacy research base; data reported and relied upon among providers and service administrators; programs constantly refined based on findings and demonstrating continuous improvement in promoting recovery.**

*Achieving “evidence-based practice” status through federally-supported research is a costly proposition. Recognizing that NAMI can and does have a growing body of evidence that supports the efficacy of its programs, we will put continuing priority on developing efficacy assessment components into our support and education programs.*

**B. NAMI's public information materials and electronic resources are state-of-the-art and sought by decision-makers and individuals, all of whom recognize NAMI as a primary resource regarding serious mental illness.**

- **Task: establish a baseline**
- **Target: inventory of materials' quantity and quality by 2008**
- **Evidence of Progress: materials reflecting the NAMI “voice” of consumer/family empowerment; materials increasingly reflect cultural diversity**

*Recent progress in conceptualizing and producing exceptionally high-quality NAMI materials will continue. We will make a conscious effort to become “The Source” for information on serious mental illness. These efforts will include both continuing overhaul and upgrade of existing materials, as well as identification and development of new resources that meet public information needs.*

**C. NAMI is establishing an inventory of educational programs that have been developed by NAMI State Organizations and Affiliates.**

- **Task: identify those programs that represent promising practices**
- **Task: share information about programs within NAMI**
- **Task: determine next steps**
- **Target: inventory complete by close of 2008**
- **Evidence of Progress: increasing familiarity within NAMI with promising practices in the field; information about programs and initiatives readily available from NAMI; future course of action becomes clear**

*Much in being done in the field for families of children and youth—and much more needs to be done. To chart a truly strategic course for our own actions, NAMI will first survey existing offerings and make that information broadly available. The inventory that NAMI develops will look particularly at programs that incorporate support groups and social activities for teens and young adults, for which there is a great need in many communities around the country. We will find ways to meet the challenges presented by the bewildering systemic obstacles that confront families of children and youth.*

**D. NAMI is developing and implementing a NAMI children’s signature program.**

- **Target: first pilot site training of trainers in 2007; program rollout, 2008**
- **Target: implementation in 10 states by 2010**
- **Target: develop internet and technology-based program format**
- **Evidence of Progress: evaluation of existing programs and best practices for selection/development of NAMI program; increasing interest in and demand for a children’s program**

*The especially high risks of the transitional years and our knowledge that serious mental illness does not suddenly emerge when a child turns 18 motivate our information collection and underscore the importance of this work. The program that NAMI develops will be flexible and adaptable to meet the challenging needs of families with children with serious mental illnesses. It will also take advantage of technology to connect program participants/families and to provide them with information that will help them to best address their child’s needs.*

**E. NAMI is increasing participation in NAMI signature education and support programs.**

- **Target: increase enrollment 25% above current baseline by 2008**
- **Target: increase enrollment 50% above current baseline by 2010**
- **Target: all programs available in Spanish by 2010**
- **Target: assess need for signature programs to be developed in other languages**
- **Evidence of Progress: expanding variety of sites where programs are delivered; Affiliates and State Organizations have expanding capacity for program; increasing number of teachers available to deliver programs in Spanish**

*While new programs are needed and much important work is being done at the State and Affiliate levels, NAMI takes tremendous pride in our “signature” education and support programs, all of which are primed for expansion. Early success in developing culturally competent materials and offering training and presentation in Spanish will continue. We will work to overcome the perennial constraints of program delivery—time and money. We will continue to seek dedicated funding to support and grow these programs in other languages, with an eye toward finding and using new strategies for program dissemination. NAMI’s signature programs include:*

- *Family-to-Family Education Program*
- *Provider Education Program*
- *Peer-to-Peer Recovery Education Program*
- *in Our Own Voice: Living with Mental Illness*
- *NAMI C.A.R.E.*
- *Support Group Facilitators Skills Training Program*
- *Hearts and Minds*
- *Parents and Teachers as Allies*



# Goal 5

**NAMI is building and incorporating the largest consumer movement in the country.**

## ***NAMI's Envisioned Future***

The NAMI “family” is inclusive and confers high value on all members of families in which someone happens to live with a serious mental illness. NAMI is widely recognized and honored as the largest and most empowering organization for consumers.

Participation in NAMI is a healing and energizing experience that contributes profoundly to individuals' recovery and resilience.

Families and consumers work together effectively to improve the lives of people who live with serious mental illness, especially those for whom recovery does not yet feel possible.

Every consumer who shares NAMI mission and vision of recovery is an active member and has found a meaningful way to participate in NAMI's growth—whether through advocacy, program, or assuming a leadership role.

## ***Realizing the Vision***

NAMI is already the largest consumer organization in the country, but we have not positioned ourselves in that manner. We will work to educate the public and potential members about the value and power of family/consumer collaboration. We recognize that sometimes the interests of families and consumers appear to diverge or compete, but we are dedicated to finding and holding common ground, recognizing that what unites us far outweighs what might divide us.

In working toward this goal, NAMI will focus primarily on incorporating these strategies:

- making NAMI a household word;
- confronting failures;
- describing and promoting best practices;
- increasing training and learning opportunities; and
- embracing and empowering leaders and members from diverse communities and consumer leaders and members.

## ***Progressing from Good to Great***

We will measure our progress through these initiatives:

**A. Having established a consumer membership baseline, NAMI is increasing consumer membership by 20%.**

- **Task: establish baseline data on consumer membership**
- **Target: 20% increase over baseline by 2010**
- **Evidence of Progress: consumers increasingly in evidence at NAMI events and gatherings; consumers increasingly in leadership positions within organization; external perceptions of NAMI as welcoming and inclusive of consumers**

*Consumers are welcome members of the NAMI community and are already a growing constituency within the organization. This membership drive will capitalize on interest that already exists. NAMI will begin with “spot assessments” to get a short-term grasp on consumer membership numbers and then build to a reliable baseline. Membership logistics and fundamentals such as membership forms will have to be addressed, as will collection of memberships’ household data for full reflection of consumer membership within the organization.*

**B. NAMI is conceiving and instituting standards for consumer-friendly Affiliates.**

- **Task: establish baseline data on consumer-specific groups**
- **Task: develop and distribute standards for “consumer friendliness”**
- **Evidence of Progress: increasing consumer membership in Affiliates; external perceptions of NAMI as welcoming and inclusive of consumers; increasing numbers of consumers in leadership positions across organization; increasing investment in consumer-oriented programming**

*As the nation’s largest consumer and family organization, NAMI will work to increase consumers’ comfort in joining NAMI groups and meetings. Recognizing that an authentic consumer culture exists, we will work to incorporate that culture into the family structure and may develop mechanisms for consumer-centered affiliates where appropriate.*

**C. NAMI is partnering with State Organizations to develop and implement pilot programs that outreach to people who are homeless, veterans, and into state hospitals, jails and prisons to increase consumer membership and participation in NAMI.**

- **Task: compile list of current programs**
- **Task: identify promising practices**
- **Target: three states piloting distinct programs by 2010**
- **Evidence of Progress: improving organizational familiarity with programs in state hospitals, jails and prisons; consumer membership and involvement in programs increasing; hospital and penal system administrators seeking and valuing NAMI engagement and presence in their facilities**

*NAMI’s dedication to the most ill and most at risk is reflected in this effort to explore using NAMI’s programs and other services to reach out to those whom we may not yet have reached. In this effort, we will seek strategic partnerships and we will explore peer roles as “ombudsmen”. This effort will also be designed to increase NAMI consumer membership. We will seek three quite distinct programs in the initial pilot states.*

**D. NAMI is establishing best practices for State Consumer Councils.**

- **Target: establish baseline data on Consumer Council functioning and structure in each state, completed by 2008**
- **Target: fully operational in 10 states by 2010**

- **Target: components include manual and implementation guidelines**
- **Evidence of Progress: more State Organizations have established Consumer Councils; State Organizations increasingly well equipped to capitalize on Consumer Councils' involvement; consumer voice effectively integrating in NAMI policy making at all levels**

*Consumer Councils can and should provide valuable support to the work of State Organizations and Boards. To be most effective, Councils must have clearly defined roles and charges. NAMI will strengthen its infrastructure by providing clear guidance on how to capitalize on consumer engagement through Councils. Implementation will almost certainly require additional resources for States, both in human and financial terms.*

**E. NAMI is creating and implementing an academy to develop emerging consumer leaders.**

- **Target: hold two academy gatherings each year in three of the five NAMI regions**
- **Target: train at least 300 emerging consumer leaders each year**
- **Evidence of progress: more consumers assuming roles within NAMI, employing skills acquired through academy; increasing number of consumers seek and acquire certification through academy**

*Constructive engagement in NAMI has proven to be a cornerstone for many consumers' recovery. NAMI will support consumers in this process—and build the pipeline of our emerging future leaders and members—by equipping consumers with organizational and leadership skills, including making presentations and finding ones niche in the NAMI movement. Building on the success of the Leadership Institute and what many State Organizations and Affiliates already do, de facto, to develop consumer members, NAMI will draw on seasoned consumer leaders' expertise and develop materials and mechanisms for cultivating these skills among others. NAMI will take advantage of new technologies and peer role models in this important work.*

**F. NAMI is significantly expanding its support group program for people with serious mental illnesses in all 50 states and Puerto Rico.**

- **Task: strategic introduction of major program mobilization and marketing effort**
- **Task: immediate “staffing-up” for program rollout**
- **Task: extensive training opportunities and use of locally-based consumer/consultants**
- **Target: first year expansion and implementation in 15 states**
- **Target: in all 50 states by close of 2009**
- **Evidence of progress: increasing consumer participation in NAMI-sponsored support groups; improving accessibility of support groups in metropolitan areas, including proximity of group meetings, frequency of meetings; increasing organization visibility**

*NAMI C.A.R.E. provides the foundation for this newly revised program. In this recovery support model, individuals who live with serious mental illnesses share experiences in safe, confidential environments and learn coping skills. The weekly 90-minute meetings will help overcome the isolation often experience by consumers. This major expansion effort will require extensive support and resources in the field. Implementation will also present exciting and challenging organizational growth that will be addressed directly through other Plan components such as development of standards, provisions of technical assistance and training, and increasing consumer involvement within NAMI.*

## Glossary

**ACT** – Assertive Community Treatment: Service-delivery model that provides comprehensive, locally based treatment to people with serious and persistent mental illnesses.

**Best Practice** – Best practices are practices that incorporate the best objective information currently available from recognized experts regarding effectiveness and acceptability.

**CIT** – Crisis Intervention Training/Team: Intensive training of law enforcement officers to respond effectively to people experiencing psychiatric crises.

**Consumer** – NAMI uses this broadly recognized term to describe people who live with a mental illness. We recognize the limitations of this terminology.

**Cultural Competence** – Delivery of services that are responsive to the cultural concerns of racial and ethnic minority groups, including their language, histories, traditions, beliefs and values.

**Evidence-Based** – Programs or initiatives that have a replicated and published research body showing them to be effective.

**Frontier** – The smallest and most geographically isolated communities in the United States.

**Goal** – In this document we use “goal” as a statement of a targeted outcome that must be true for NAMI to achieve greatness. Goals are not necessarily achievable within the period of the plan, but their constant and aggressive pursuit is the hallmark of plan implementation.

**“Good to Great”** – Theoretical framework used by NAMI to organize our strategic vision and plan, derived from Jim Collins *Good to Great and the Social Sectors*, 2005.

**Key Initiative** – Measurable activity against which we can monitor forward movement toward plan goals. Each goal statement has a half-dozen or more implementation activities that serve as Key Initiatives.

**Linguistic Competence** -- Capacity to communicate effectively, and convey information in a manner that is easily understood by diverse audiences, including persons of limited English proficiency, those who have low literacy skills or are not literate, and individuals with disabilities.

**Research-Based** – Programs or other initiatives that research evidence has shown to be effective

**Rural** – Sparsely settled places away from the influence of large cities and towns.

**Strategy** – Choices we make about *how* we will reach goals contained in this plan. Strategies are expressions of our organizational values.

## NAMI Strategic Planning Timeline

|                                |                                             |                                                                                                                                                                           |
|--------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>August 2006</b>             | <b>Planning Retreat</b>                     | SPG meeting to develop plan                                                                                                                                               |
| <b>September</b>               | <b>Board Meeting</b>                        | Planning Committee report on progress to date                                                                                                                             |
| <b>September - November</b>    | <b>Working Phase</b>                        | SPG continued work<br><i>refining strategies, setting metrics, reviewing initiatives</i><br>Staff perform resourcing assessment<br><i>what will these proposals cost?</i> |
| <b>November</b>                | <b>Strategic Planning Group Reconvening</b> | SPG reconvened to review staff assessments, identify priorities                                                                                                           |
| <b>December</b>                | <b>Board Meeting</b>                        | Planning Committee presented SPG draft plan to Board<br><i>Goal: Board acceptance of draft to go forward for public comment</i>                                           |
| <b>January – February 2007</b> | <b>Active Listening</b>                     | Planning Committee hosted Town Hall calls for public comment phase; Board incorporation of input into final version on plan                                               |
| <b>March</b>                   | <b>Board Meeting</b>                        | Planning Committee presented final version of plan for Board review<br><i>Goal: Board approval of plan</i>                                                                |

# NAMI 2006 Strategic Planning Group

## Mission

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The Strategic Planning Group was charged with developing NAMI's 2007 – 2010 Strategic Plan.

## Composition

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Strategic Planning Group (SPG) members were selected to represent key stakeholders at each level of the NAMI organization – local, state, and national. The SPG is a representative and diverse group, composed of members of the Consumer Council, State Presidents Council, Executive Directors Group, Veterans Council, leaders from unstaffed Affiliates, national Board members, and national staff.

### **NAMI National Board's Planning Committee**

- Fred Sandoval, *chair*
- Carol Caruso
- Guyla Daley
- Gloria Walker
- Eileen White
- Sheila Amdur [*joined Committee June 2006, co-chair*]
- Suzanne Vogel-Scibilia, *board president*
- Don Muller, *State Presidents Council chair 2005-2006*
- Judith Evans, *State Presidents Council chair 2006-2007*
- David Seay, *Executive Directors Group chair 2005-2006*
- Sue Abderholden, *Executive Directors group chair 2006-2007*
- Marty Raaymakers, *Consumer Council chair*
- Tom Shade, *Veterans Council representative*
- Mary Gibson, *Veterans Council chair*

### **Volunteer Affiliate Leadership**

- Nancy Carter, *NAMI Urban Los Angeles (CA) [elected to National Board, June 2006]*
- Jean Key, *NAMI Cookeville (TN)*
- Gretchen Meyer, *NAMI Southaven (MS)*
- Lupe Morin, *NAMI San Antonio (TX)*
- Jim Randall, *NAMI San Fernando Valley (CA)*
- Janet Susin, *NAMI Nassau Queens (NY)*

### **NAMI National Staff Leadership**

- Mike Fitzpatrick, *executive director*
- Lynn Borton, *chief operating officer*
- Ron Honberg, *policy director*
- Joyce Burland, *education and programs director*
- Katrina Gay, *communications director*
- Darcy Taylor, *development director*