

Introduction

According to the National Institute of Mental Health (NIMH) one in four adults in the United States suffers from a diagnosable mental disorder, and 6% of the population suffer from a severe mental illness. Family members and friends are directly affected by their loved one's illness. As our knowledge of mental health continues to expand, many disorders are treatable with adequate medical care, counseling, education, and other support services. Yet stigma and ignorance surround mental illness, and as a result consumers go without the care, treatment, and services they need, and their family members and friends without support and information.

We are living through an important political and social moment. Economic recession is cutting into state and federal budgets for health care, while at the same time new faces in political leadership mean new opportunities for change. In order to effectively take advantage of these opportunities, and to strategically engage with these challenges, the Massachusetts chapter of the National Alliance on Mental Illness (NAMI MASS) initiated a strategic planning process at the end of 2008. NAMI MASS asked Cambridge Concord Associates (CCA), a strategic planning firm from Massachusetts, to work with them. Through this process NAMI MASS is clarifying its mission and defining an effective strategy for moving forward.

The following document is a product of two NAMI MASS board meetings facilitated by Elaine Kuttner of CCA, as well as a staff meeting and a set of phone interviews. This is still a *working document*, which will change and grow as NAMI MASS and its affiliates move forward with planning in the coming months.

Mission

At the February 2009, retreat the board initiated a conversation regarding the mission of NAMI MASS. This discussion centered on the current mission of NAMI National, which, in general, resonated with those around the table:

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.**

NAMI MASS board members thought it appropriate for the Strategic Plan to have a Mission, Vision and Values:

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Mission: The Mission of NAMI Massachusetts is to improve the quality of life for people with serious mental illness and for their families.

Vision: *We seek to extend the educational, support and advocacy programs of NAMI Massachusetts so that we will be widely known and recognized as the voice on mental illness in Massachusetts. NAMI Massachusetts will advocate at all levels to ensure that all persons affected by mental illness receive, in a timely fashion, the services that they need and deserve.*

Values: Central to NAMI Massachusetts is a commitment to programs that are both peer/consumer-driven and family-driven; to the key concepts of recovery, resiliency, and support that are essential to wellness and quality of life for all persons affected by mental illness; and to full and meaningful lives for all persons affected by mental illness.

Strategic Direction #1: Education and Support

In five years, the NAMI MASS education and support programs will be highly effective, across the state, in terms of appropriate technology and best practices. The number of programs will double with particular focus on programs developed with and for currently underrepresented populations.

Education and support programs have been consistent strengths of NAMI MASS, and as such are a foundation on which to continue building. At the same time, mental health doesn't limit itself to any one population - it affects every age group and every culture. With this plan, NAMI MASS will strengthen and grow its existing peer-led education and support programs with particular emphasis on increasing, broadening and diversifying the communities NAMI serves – partnering where possible.

Two-Year Strategies

Effectiveness

- Assess the effectiveness, in conjunction with the affiliates, of current NAMI MASS programs with focus on web technologies and implementing best practices.
- Based on findings, create coordinated plan to apply best practices and evaluate success.

Growth and Diversity

- Make decisions about which under-represented populations NAMI MASS would like to reach out to first, and assess current relationships on which to build, at both state and affiliate levels. Potential populations include:
 - Latinos (English-, Spanish- and Portuguese-speaking)
 - African Americans
 - Asians (Hmong)
 - College Students
 - Families with small children

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- Find and begin to build relationships with individuals in these communities – individuals who are leaders, with connections and knowledge about the community. (These may be positional leaders, or more informal leaders.) These relationships should also be built at the state and affiliate levels.
- Where there is interest, and in conjunction with these leaders and other organizations in the community, create support and education programming adapted to the specific needs and values of the community in which they function.
- Recruit and train F2F and Support Group facilitators to run these new programs with the appropriate language skills.

New Programs

- Internal assessment of interest, potential and capacity for new programming. Potential areas include the inmate population, veterans, health professionals, law enforcement and student populations.

Strategic Direction #2: Advocacy

In five years, NAMI MASS will have significantly moved private and public policy in conjunction with selected, strategic partners from across the institutional spectrum.

One of the core aspects of the NAMI MASS mission is advocacy – creating changes in private and public policy that benefit people with mental illness and their friends and families. One way for NAMI MASS to increase its capacity to move policy is through collaboration with other non-profits, businesses, medical institutions and others. At the same time, collaboration uses valuable organizational resources, and so must be done thoughtfully and strategically, in line with the goals and values of this plan.

Two-Year Strategies

- Confirm a clear and aggressive advocacy agenda for the coming 1-2 years.
- Strategically select the institutions with which to collaborate in order to increase the ability of NAMI MASS to fulfill its agenda.
- Assess current relationships with said institutions. Strengthen these existing relationships and begin to form new relationships where they are lacking.
- In conjunction with interested partners, formulate and begin to carry out joint advocacy action plans towards shared goals.

Strategic Direction #3: Affiliate and Membership Growth

In five years, NAMI MASS will have increased its membership by 20% with much of this increase in under-represented populations. NAMI MASS will have 3 new affiliates in urban centers, serving diverse populations, and all NAMI affiliates will be sufficiently resourced and will be aligned through best practices and coherent and consistent processes.

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In its effort to be accessible and available to all those in the Commonwealth, NAMI MASS is dedicated to growth and diversification at all levels of the organization in terms of race, ethnicity, age and other considerations. This will take concerted, coordinated effort by the state office and affiliates. In order to carry this out affiliates must be well supported. In some areas, new affiliates will be needed – such as dense urban areas – while in others current under-resourced offices might potentially be merged.

Two-Year Strategies

Membership and Diversity

- Use relationship-building process around education and support program expansion to encourage new membership
- Increase the diversity of leadership at the state level starting with recruitment for committees and task forces outlined below
- Develop a membership system that works with the National office and affiliates to streamline the process for joining and rejoining NAMI
- Expand affiliates as described below

Affiliates

- Establish and nurture strong communication between board, staff and affiliates by clarifying roles and responsibilities
- Develop effective specific criteria for all NAMI affiliates and help their leaders meet those criteria over time. Special focus should be given to increasing capacity to work with diverse populations.
- In partnership with affiliates, assess needs of current affiliates. Make decisions about how to move forward with each affiliate – increasing staff, merging offices, etc.
- Target areas for new affiliates based on the goals of this plan and begin process of establishing them. Potential areas include: Boston, Springfield, and Worcester. This process may go hand-in-hand with the expansion of programming.

Strategic Direction #4: Visibility and Marketing

In five years, NAMI MASS will be the “recognized voice of mental illness in the Commonwealth” among providers, state officials, DMH management, sister organizations and the statewide media. It will have a clear, consistent and powerful message that resonates with a diverse population, and a comprehensive strategy for visibility that effectively utilizes partnerships, events, publications and the media.

In order to be effective in moving policy and making valuable education and peer-support opportunities available to all, a two-pronged strategy is necessary. NAMI MASS needs to widely disseminate its messages, and at the same time raise the visibility of the organization itself. These two goals are intertwined, and each supports the other.

Two-Year Strategies

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- In partnership with affiliates, clarify and strengthen the NAMI MASS message of recovery, resiliency and support
- Create new materials for visibility and message dissemination – wherever possible integrating new technologies
- Choose potential partner institutions that could assist in visibility and messaging, assess current relationships and begin to build new relationships at all levels of the organizations
- Increase outreach to the membership base of partner organizations
- Create a new report on the state of mental health services in MA.
- Explore potential growth of the NAMI-Walk in person and through the use of electronic tools such as the internet

Strategic Direction #5: Fundraising

In 5 years, NAMI MASS will have raised 2 million additional dollars from increasingly diversified sources, and will have cultivated ongoing relationships with its donors.

The success of this strategic plan relies on a bold and comprehensive fundraising approach in order to increase the capacity of the organization to fulfill its mission and the above strategies. The organization will need to dedicate substantial resources towards enhancing its fundraising capacity – an investment necessary to build the future herein envisioned.

Two-Year Goals

- The Board will take the lead in raising the funds to hire a full-time staff person in charge of fundraising and marketing and establish marketing internships at the NAMI MASS central office
- Create a new, expanded website
- Develop a comprehensive fundraising plan that leverages current strengths, such as the NAMI Walk, is integrated with the other four strategic directions, and has a focus on expanding corporate donors and individual high-level givers.
- Establish a second signature fundraising event to connect with wealthy individuals and corporate sponsors
- Review all current sources of revenue with an eye to increasing the range and amount of revenue, and ensuring longevity of the source.
- Put out new materials with heavier focus on clarity of where money goes and the celebration of funders.

Governance

NAMI MASS is in the process of adjusting current governance structures and creating new ones in order to effectively and efficiently carry out the above plan. The following is a first attempt to identify a system of permanent committees and short-term task forces that will be charged with moving forward on all five strategic directions. These committees and task forces will all have representation from the board, and will include members representing affiliates from different parts of the state. ***Note: This is a significant change and reflects the planning session conversation regarding the need***

DRAFT sent to Affiliates for comment

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for ongoing involvement by affiliates. If Affiliates are to be more involved in NAMI Mass, then the governance should reflect that as much as possible. Committees are a good place to seek involvement in the activities of the Board. Every effort will be made to maintain racial, ethnic, age and other types of diversity on said committees – the first step to an eventual diversification of the governing board.

Board Committees

- Education & Support
- Public Policy & Advocacy
- Fundraising and Marketing
- Finance
- Affiliate and membership growth
- Executive Committee which shall include Nominating

Task Forces:

- Task force to update the Board manual
- Task force to recruit fundraising staff person
- Task force for The Walk

Next Steps:

Between now and August 14, 2009, Board will seek feedback from Affiliate and membership. We will post draft strategic plan on our Web Site and use other methods to get NAMI members to give feedback.

Elaine Kuttner will synthesize all affiliate comments and get a new version back to the Board in time for its September 12, 2009 board meeting. Board hopes to ratify the Strategic Plan at its September meeting.

Final distribution of Strategic Plan at our State Convention in Springfield on 10/24/09. The Convention will include a workshop on our Strategic plan.

Our goal is to get the board, staff, affiliates and our members all on the same page going in the same strategic directions as outlined in our Strategic Plan.