



Strategic Plan 2007 – 2011

May 21, 2007

April 24, 2007

Board of Directors
National Alliance on Mental Illness of Minnesota (NAMI-MN)

Dear Board Members:

In 2005, Board discussions centered on the intensive pressure on NAMI-MN resources due to its growth and demand for its services and information and the need to plan for that growth. In response, the NAMI-MN Board launched a strategic planning process in June 2006 that was designed to address the issues of demand, model the inclusive and interactive values of the organization and result in a consensus on broad-based vision, goals, and strategies for the future.

The Board's Strategic Planning Committee, charged with developing NAMI-MN's 2007 – 2011 Strategic Plan, has guided the strategic planning process since its launch in 2006. Committee members were selected to represent key stakeholders at each level of the NAMI-MN organization and form a representative and diverse group to ensure the plan reflects the needs of the community and the wisdom of as many stakeholders as possible. We want to thank the members of the Strategic Planning Committee, including:

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NAMI-MN's Strategic Planning Committee is pleased to offer this draft 2007 – 2011 NAMI-MN Strategic Plan to the Board of Directors for its consideration.

Sincerely,

Lou Burdick, Chair
Strategic Planning Committee

Sue Abderholden
Executive Director

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GOVERNING PRINCIPLES

BACKGROUND

The National Alliance on Mental Illness of Minnesota (NAMI-MN) is a 501(c) (3) nonprofit, grassroots organization dedicated to improving the lives of children and adults affected by mental illnesses and their families. NAMI-MN was formally organized in 1977 after a small group of people – who met around a kitchen table – tried to convince the legislature to fund a state pilot project for community mental health treatment. This “kitchen table coalition” was propelled to action because there were no community services to support their family members when they were discharged from the state hospital. These committed volunteers ultimately joined forces with other similar groups throughout the U.S. and the National Alliance on Mental Illness was born. The NAMI-MN organization went on to develop education programs, recovery programs, support groups and anti-stigma campaigns. NAMI-MN continues to provide leadership throughout Minnesota as it strongly advocates for programs that enable people with mental illness to live, learn, and work in their communities.

MISSION

NAMI-MN champions justice, dignity, and respect for all people affected by mental illness (biological brain disorders). Through education, advocacy, and support, we strive to eliminate the pervasive stigma of mental illness, effect positive changes in the mental health system and increase the public and professional understanding of mental illness.

VALUE STATEMENTS

We Believe:

- Adults and children with mental illness are resilient and can recover
- Families are an important and integral factor to recovery from mental illness
- Building a strong grassroots organization will benefit those impacted by mental illness

In fulfilling our mission we will:

- Treat every person who contacts NAMI-MN with dignity, empathy and respect, recognizing that he or she is a person first, not simply a diagnosis
- Recognize the biological nature of mental illness and work to dispel stigma
- Provide accurate information, tools, guidance and hope so that people can advocate for themselves and their families
- Recognize and respect cultural differences
- Seek to understand and empathize with each person’s situation and neither blame or shame the individuals or families
- Invest in each individuals’ situation while at the same time working for systemic reform
- Invite people to return to NAMI as a resource whenever the situation is not resolved or worsens

AREAS OF EMPHASIS

NAMI-MN focuses its work in three core areas:

Education and awareness: furthering an understanding of mental illness by providing education to people with mental illness, their families and the community

Support: connecting individuals with mental illness and their families to each other

Advocacy: seeking to change mental health care systems to provide effective treatment and support services for all who need them

VISION FOR 2011

NAMI MN is the driving force and provides leadership for change for Minnesotans with mental illness throughout this first decade of the 21st century. Staff and volunteers work collaboratively with the general public, community organizations, health professionals, providers, and especially children and adults with mental illness and their families.

NAMI-MN changes the way Minnesotans think about and respond to mental illness for the betterment of everyone in the state. It is not only safe to admit that someone has a mental illness, but children and adults get the supports and services that they need.

2011 PROJECTED ACCOMPLISHMENTS

- **Stigma is Dramatically Reduced** – There is a paradigm shift in Minnesota which removes the stigma of mental illness in the eyes of the public, providers, and employers. This means that children and adults with mental illness and their families can live, learn, and work within our community without prejudice or blame.
- **Ready Access to Needed Care** – Mental health care, information and support are available at the right level and the right time for each person and family regardless of where they live in Minnesota or of their economic status.
- **Recovery-Based Model** – The mental health care model is centered on the belief that individuals recover, is focused on early intervention while responding to crisis, recognizes that the mental health community is knowledgeable about identification, assessment, and effective treatment of mental illness, and advocates for insurance coverage on parity with other health needs.
- **The Special Needs of Culturally Specific Populations are Addressed** – Certain culturally specific populations with unique needs are now a focus of the medical community. Early detection of mental illness is the norm, mental health services are integrated at all levels in schools and colleges, and meaningful employment exists for our youth regardless of the mental health issues they are facing. The unique needs of military personnel and the elderly are better understood, diagnosed and addressed. Cultural differences are reflected in treatment protocols. Special mental health care needs of people who are homeless or in prison are attended to without prejudice.

2011 BROAD STRATEGIES

- Ensure that NAMI-MN programs are available throughout the state regardless of location through a network of local affiliates and support groups, a statewide information and referral system, and ever-expanding workshop offerings and mental health trainings in rural Minnesota.
- Engage state elected officials and policy makers in mental health issues by providing information, proposing solutions, and informing constituents. NAMI-MN educates the public and builds coalitions of interested citizens and organizations in order to help shape legislation, state department regulations and procedures, and the operation of mental health providers (provider associations, hospitals, mental health clinics, etc.).
- Advocate for children and adults with mental illness and their families by raising awareness of the general public, supporting innovative programs, reaching out to diverse communities, and promoting integration of mental health services in schools, hospitals, correctional institutions and social service agencies.

GOALS SUMMARY

- Goal 1 Educate and inform individuals with mental illness, families, and the general public about mental illness and reduce stigma**
- Goal 2 Strengthen Affiliates' services, communication, and relationships with each other and NAMI-MN**
- Goal 3 Build on public policy momentum to increase mental health care funding and access to quality mental health services**
- Goal 4 Establish a presence throughout Minnesota**
- Goal 5 Increase understanding of NAMI-MN, its programs, and services throughout Minnesota**

Goal 6 Increase and diversify funding for NAMI-MN's mission, programs, and legislative impact

Goal 7 Accomplish NAMI-MN's vision through strong staff and volunteers

GOALS AND STRATEGIES

The following are NAMI-MN's goals and strategies developed jointly by board and staff with significant input from the communities it serves.

Goal 1 Educate and inform individuals with mental illnesses, families, and the general public about mental illness and reduce stigma

Background

Through education, advocacy, and support, NAMI-MN strives to improve lives by eliminating the pervasive stigma of mental illness, affecting positive changes in the mental health system and increasing the public and professional understanding of mental illness. NAMI-MN continues to focus the majority of its resources on making a difference through:

- Classes for families and children
- Workshops for professionals in the field
- Public forums and conferences

Therefore, ensuring that NAMI-MN continues to increase the number of people who have access to its services and programs is a priority for the organization. This educational programming will continue to be accomplished through a combination of increasing participation in existing services and programs, offering new services and programs aimed at new target populations and developing and offering new services and programs in response to emerging needs.

Strategies

1) Increase the number of offerings of the most effective programs in order to increase the number of people who can participate.

As part of implementing this strategy it will be necessary to:

- a) Identify the most effective and popular programs
- b) Establish new venues for these programs that will attract new people
- c) Enhance the most effective and popular programs to facilitate participation

Milestones/Responsibility

- Evaluate and strengthen the 2-3 most effective and popular programs by October 2007 (Associate Director)
- Offer the most popular and effective programs in 5 new venues by July of 2008 (Grassroots Organizer and Associate Director)

2) Develop new or modify existing programs in order to serve new culturally specific populations, the elderly, veterans and their families that have been identified as priorities by the board.

As part of implementing this strategy it will be necessary to:

- a) Identify new target populations, including members of the military and communities of color and the elderly, who have mental health needs that are not being readily addressed by the programs and systems now in place
- b) Understand the mental health needs of these communities and tailor NAMI-MN responses to these target groups
- c) Develop services and programs that are readily accessible by the target populations

Milestones/Responsibility

- Develop two new or modified programs for two or more of the targeted populations by December 2008 (Associate Director)
- Promote and conduct at least two programs for targeted populations by July 2009 (Program Manager)

3) Increase NAMI-MN volunteer involvement in services and programs traditionally offered by staff in order to provide more opportunities to serve more people and increase access to services and programs.

As part of implementing this strategy it will be necessary to:

- a) Identify effective services and programs that can be offered by volunteers
- b) Recruit volunteers willing to make a commitment to deliver services and programs to the community
- c) Train volunteers using a train-the-trainer model of train-practice-do

Milestones/Responsibility

- Recruit and train 5 volunteers to deliver traditionally staff led NAMI-MN programs by Dec 2007 (Volunteer Coordinator & Associate Director)
- Offer at least two volunteer led programs by July 2008 (Volunteer Coordinator)

4) Develop a media plan in order to increase public awareness about mental illness and reduce stigma.

As part of implementing this strategy it will be necessary to:

- a) Prioritize community needs based on input from individuals with mental illness, stakeholders, volunteers and staff
- b) Develop a media plan that is cost effective in reaching individuals with mental illness and stakeholders
- c) Secure funding to deliver the media plan

Milestones/Responsibility

- Develop an organizational media plan December by 2007 (Executive Director and Newsletter Editor)
- Secure funding for first phase of the media plan by July 2008 (Development Director)
- Implement first phase of the media plan by December 2008 (Executive Director and Newsletter Editor)

Goal 2 Strengthen affiliates' services, communication, and relationships with each other and NAMI-MN

Background

NAMI-MN volunteers are the heart of the organization, and it is these volunteers working through their local affiliates that will enable NAMI-MN to grow its programs. There is a need for more educated, organized advocates statewide to further the NAMI-MN legislative agenda. This can only happen through a strong network of affiliates which will promote a necessary increase in membership. Affiliates have asked for and want a stronger connection with the state and other affiliates which speaks to good communication at all levels, and an increased exchange of information both among affiliates and between the state office and affiliates. Therefore, ensuring that local affiliates have the support and encouragement they need to be most effective is a priority for the organization.

Strategies

1) Coordinate communication and support to affiliates on a regular basis in order to provide needed support to affiliate leaders.

As part of implementing this strategy it will be necessary to:

- a) Become highly visible with affiliates and their leaders
- b) Provide training and programming that will strengthen affiliates

Milestones/Responsibility

- One to two times each year someone from NAMI-MN will visit each affiliate to engage board members, better understand local needs and facilitate community organizing (Grassroots Organizer & NAMI-MN Staff)
- Co-host with affiliates at least six events each year related to:
 - a) Building knowledge of children's mental health issues
 - b) Understanding best practices for facilitating NAMI-MN support groups
 - c) Strengthening leadership through trainings re: community organizing and nonprofits (Grassroots Organizer and NAMI-MN Training Staff)

2) Develop and enhance several communication vehicles in order to facilitate and increase communication between the state office and affiliates and among affiliates.

As part of implementing this strategy it will be necessary to:

- a) Assist affiliates in obtaining and making good use of technology to provide for the most efficient exchange of ideas and information
- b) Provide regularly scheduled opportunities for affiliates to exchange information
- c) Strengthen the newsletter as an opportunity for affiliates to share information about successes

Milestones/Responsibility

- Conduct monthly conference calls with affiliate leaders to promote information sharing (Grassroots Organizer)
- Assist local affiliates in setting up their websites and providing links to the state website (Grassroots Organizer)
- Provide a designated space for affiliates to share information/success stories through the NAMI-MN Newsletter and Leader Letter (Newsletter Editor & Grassroots Organizer)
- Establish an affiliate list serve or a blog for the affiliate leadership to connect with each other (Grassroots Organizer)

3) Develop a component of the NAMI-MN marketing plan that will directly benefit the affiliates in order to efficiently and effectively support their efforts to recruit members and raise funds.

As part of implementing this strategy it will be necessary to:

- a) Establish branding standards to develop a professional look for all informational materials and promotional ads
- b) Identify services that although provided locally can be more efficiently and effectively centralized and pilot them with several affiliates
- c) Explore ways to assist the affiliates fundraising efforts

Milestones/Responsibility

- Develop one brochure or informational pamphlet a year which can be used/modified locally to assist in member recruitment and program promotion (Grassroots Organizer)
- Develop a centralized phone messaging system and a centralized postal system that can support a local affiliate and increase efficiency and professionalism, and test it by 2008 (Grassroots Organizer)

- Provide fundraising vehicles in which affiliates can participate (such as a NAMI-MN walk) (Grassroots Organizer, Executive Director & Walks Manager)
- 4) Explore alternative structures for organizing affiliates in order to enable affiliates to more efficiently operate and to organize in parts of the state where no affiliates exist.
- As part of implementing this strategy it will be necessary to:
- a) Explore alternative structures that will enable local affiliates to easily organize and have tax-exempt status
 - b) Explore the possibility of regional structures to assist in organizing the parts of the state that have not established an affiliate
 - c) Explore the possibility of having one or more NAMI-MN satellite offices staffed to support affiliate activities in the most rural parts of the state

Milestones/Responsibility

- Develop a program in which affiliates could organize under NAMI-MN or use NAMI-MN as a fiscal agent in 2008 (Ad Hoc Board Committee with Executive Director)
- Pilot at least one regional (multi-county) affiliate in a part of the state that does not have an affiliate in 2008 (Grassroots Organizer)
- Secure funding for a regional office to be established in 2008 (Executive Director & Grants Manager)

Goal 3 Build on public policy momentum to increase mental health care funding and access to quality mental health services.

Background

NAMI-MN has been very successful passing legislation related to mental health issues. However, with reduced Federal and State funding, Medicaid policies changing, changes in the way that agencies respond and with more companies becoming self-insured, there is a need to redouble efforts to advance the NAMI-MN legislative agenda. Several goals include expanding access to community services, improving outcomes, reducing disparities among various communities (military, communities of color, incarcerated, etc.), insuring that state and local dollars are well spent, and increasing the flow of funding at the state level. This can only happen through a strong network of affiliates and grassroots advocates who can make their presence felt at the legislature.

Strategies

- 1) Expand the number of volunteers who can play an important role in implementing the NAMI-MN legislative agenda in order to more effectively deliver the message to policy makers and reduce the staff workload.

As part of implementing this strategy it will be necessary to:

- a) Determine which roles and responsibilities can best be addressed by staff and which by volunteers
- b) Provide training and mentoring that will strengthen the skills of volunteers
- c) Test out an expanded role for Legislative Committee members

Milestones/Responsibility

- Develop several volunteer job descriptions for splitting out some of the legislative staff work to volunteers, fill these volunteer jobs within three years (Executive Director & Legislative Committee Chair)
- Provide training and mentoring within the Legislative Committee on an annual basis for:
 - a) Enabling people to attend meetings and represent the organization on legislative issues
 - b) Representing NAMI-MN on children's mental health issues

c) Representing the organization on some of the collaborations (Executive Director & Legislative Committee Chair)

2) Develop and implement an internship program in order to provide staff with ongoing support by students interested in working on legislative issues.

As part of implementing this strategy it will be necessary to:

- a) Explore internship possibilities with the U of M (Humphrey Institute) and other local colleges
- b) Secure funding for up to two paid internships
- c) Develop an appropriate role and responsibilities for interns

Milestones/Responsibility

- Secure funding for internships from individual donors through a special fundraising effort by July 2008 (Executive Director and Development Director)
- In 2008 provide one internship to assist in tracking and analysis of bills and writeup of summaries by July 2008 (Executive Director and Legislative Committee Chair)

3) Develop the NAMI-MN legislative response systems in order to more efficiently and effectively educate and inform the membership.

As part of implementing this strategy it will be necessary to:

- a) Explore ways to increase the affiliates' speed in getting out the necessary information to the membership and responding to calls to action
- b) Explore opportunities to use technology to educate and inform the membership

Milestones/Responsibility

- Develop an expanded and improved list serve for those members who use e-mail and a hard copy system for those who do not by December 2008 (Executive Director & Grassroots Organizer)
- Create new elements of state and local websites to inform the membership about the mental health issue 2008 (Grassroots Organizer)

4) Develop and expand the various ways to educate the public, membership and elected officials in order to more efficiently and effectively enhance the NAMI-MN legislative agenda.

As part of implementing this strategy it will be necessary to:

- a) Look for ways to do more with the media so that there is coverage of the major mental health issues
- b) Explore methods to educate policy makers including candidates, so that they will be informed of the mental health issues before they are faced with legislation
- c) Build media relations capabilities of staff and augment with volunteers where possible

Milestones/Responsibility

- Meet with the editorial boards of media outlets and work to obtain 3-4 human interest stories into the major newspapers, radio, and television outlets in the state to inform the public and membership of the mental health issues facing the community on an annual basis (Executive Director and Legislative Committee Chair)
- Send out letters to elected officials and candidates on a regular basis to inform them of mental health issues and NAMI-MN's position and hold house parties with legislators on an annual basis (Executive Director and Legislative Committee Chair)

Goal 4 Establish a presence throughout Minnesota

Background

NAMI-MN is a statewide organization with a mission that encompasses all of Minnesota. The challenge is that currently the organization has a minimal presence in certain regions of the state where there are no affiliates. The only way that the organization can have a presence and offer services throughout the state is by having a strong network of affiliates. For some regions, in particular those with sparse population, it has been unrealistic to attempt to create a local affiliate and operate some programming using the current NAMI-MN model. Nevertheless, all Minnesotans need to have access to support when facing issues of mental illness. Therefore, ensuring that NAMI-MN has a presence everywhere in Minnesota is a priority for the organization.

Strategies

1) Encourage strong county affiliates to expand beyond their county in order to provide programming to neighboring county(ies) that do not have an affiliate.

As part of implementing this strategy it will be necessary to:

- a) Assess the current affiliates that could readily expand into unaffiliated neighboring county(ies) and access additional funding (United Way, corporations, etc.)
- b) Develop some models for this expansion using existing strong affiliates
- c) Provide encouragement and support from the central office

Milestones/Responsibility

- Develop two models with supporting centralized services (e.g. centralized phone system, virtual office support, etc.) to facilitate the expansion by July 2007 (Grassroots Organizer)
- Support the expansion of at least one affiliate each year into a neighboring county by July of 2008 (Grassroots Organizer)

2) Establish regional staff located in a part of the state that has had a difficult time forming affiliates in order to provide on-site support and technical assistance to start-up affiliates.

As part of implementing this strategy it will be necessary to:

- a) Secure funding for at least three years to support regional staff in Greater Minnesota
- b) Analyze the best places to establish regional office(s) considering need, resources, and opportunities
- c) Develop ways to support the work of the regional staff through the NAMI-MN State office

Milestones/Responsibility

- Secure funding for one regional staff by December 2007 (Grants Manager)
- Develop a support team and a plan to work with the regional staff by December 2007 (Executive Director)
- Hire first regional staff by July 2008 (Executive Director)

3) Provide two educational events/programs in each region every year in order to increase understanding about mental illness and visibility for NAMI-MN.

As part of implementing this strategy it will be necessary to:

- a) Secure resources that can be made available to unaffiliated areas which do not have access to these resources during start up
- b) Explore ways to assist/augment the new affiliates in event planning in their county
- c) Develop contacts who can serve as hosts in parts of the state where there are currently no affiliates

Milestones/Responsibility

- Secure funding for a pilot effort to provide financial support to assist in the creation of a new affiliate by December 2007 (Grants Manager)

- Develop a centralized plan for providing training in all parts of the state with one training with a focus on children and one with a focus on adults by December 2007 (Grassroots Organizer and Associate Director)
- Offer educational events/programs in Minnesota according to the following timeframe:
 - One in every region of the state by July 2008
 - Two in every region of the state by July 2009 (Grassroots Organizer and Associate Director)

Goal 5 Increase understanding of NAMI-MN, its programs, and services throughout Minnesota

Background

NAMI-MN is a statewide organization with a presence throughout the state of Minnesota through affiliates, programs and services and an expanding membership. People with mental illness and their families need to know about how NAMI-MN can support them. The challenge is that people with mental illness often have a small time period when the information about NAMI-MN is vital to accessing the services at the exact time that they need them. From experience, leadership knows that people learn about NAMI-MN in primarily three ways:

- Referral - A health care professional provides a referral to NAMI-MN or one of its programs
- Word of Mouth - Family, friends or neighbors have had experience with NAMI-MN and make a recommendation which connects the person to the organization
- Event – A NAMI-MN Board member, staff, or volunteer makes a presentation at a meeting or event which makes an impression and provides information at just the right time

Given the nature of the needs of people with mental illnesses and their families, the staff and volunteer capacity of the organization and the resources available, these will continue to be the three primary ways that people access the organization and its services over the next three years. Therefore, ensuring that NAMI-MN broadens the base of people who can represent NAMI-MN, its services and programs, and who can provide information is a priority for the organization. This will be done through a targeted marketing and communication process rather than a shotgun approach to getting the word out.

Strategies

1) Build the word of mouth marketing efforts of the board, staff and volunteers in order to increase the number of people who can accurately and passionately represent the organization.

As part of implementing this strategy it will be necessary to:

- a) Identify the core group of people who NAMI-MN wants to be able to represent the organization
- b) Clarify the message(s) that they want these people to communicate
- c) Provide training opportunities for the core group of people to learn how to deliver the message(s)

Milestones/Responsibility

- Develop clear message(s) for NAMI-MN staff and volunteers to use to accurately represent the organization by October 2007 (Executive Director)
- Train 25 volunteers and staff to deliver the key message(s) by July of 2008 (Volunteer Coordinator and Associate Director)

2) Ensure that key referral sources have updated information and communication materials in order to increase the referrals to NAMI-MN.

As part of implementing this strategy it will be necessary to:

- a) Identify key referral sources, including organizations in rural communities, where there may not be affiliates
- b) Determine ways to access providers in the health care/mental health community, considering associations and provider groups

c) Update all communication materials for distribution to referral sources

Milestones/Responsibility

- Update all communication materials for extensive printing by December 2007 (Executive Director and Newsletter Editor)
- Meet with and distribute materials to key referral sources and health care/mental health associations and provider groups by July 2008 (Volunteer Coordinator and Associate Director)

3) Increase NAMI-MN staff and volunteer presence at speaking events around the state in order to directly increase the visibility of the organization and get the key messages out.

As part of implementing this strategy it will be necessary to:

- a) Select the target populations for speaking engagements (prioritize the health care/mental health associations and provider groups in the first year)
- b) Train staff and volunteers to represent the organization at speaking engagements
- c) Develop a system(s) to implement both an assertive and responsive speakers program

Milestones/Responsibility

- Train 10 staff and volunteers to be representatives of the organization at speaking engagements by December 2007 (Volunteer Coordinator and Associate Director)
- Develop a system to secure 40 speaking engagements each year by December 2007 (Volunteer Coordinator and Associate Director)
- Conduct 40 speaking engagements on behalf of NAMI-MN annually, at least 10 should be at events where health care/mental health providers are present (Volunteer Coordinator and Associate Director)

4) Strengthen NAMI-MN's website in order to directly increase access to the organization by people who regularly use the internet to respond to their needs.

As part of implementing this strategy it will be necessary to:

- a) Enhance the current website so that people searching for mental illness programs and services will be taken to the website
- b) Understand how to be a top listing with some of the primary internet search engines (e.g. Yahoo, Google, etc.)

Milestones/Responsibility

- Develop an enhanced website that increases the annual hits by at least 25% by December 2008 (Newsletter Editor)

Goal 6 Increase and diversify funding for NAMI-MN's mission, programs, and legislative impact

Background

The organization has successfully broadened its fundraising beyond the membership dues and special events that provided the lion's share of its resources in its earlier times with the addition of a grant writer that has enabled NAMI-MN to obtain strong and growing support from foundations and some government grants. In addition, it has launched and sustained an effective and well-targeted direct mail program and has begun to work on building relationships with individual donors with the potential to contribute at a more significant level, as well as increasing Board engagement in fundraising. The bottom line is that additional resources are a fundamental requirement for implementation of this strategic plan.

Strategies

1) Reconstitute the Development Committee and fully engage the Board of Directors in fundraising in order to increase the emphasis on individual donors

As part of this strategy, it will be necessary to:

- a) Expand the major activities of the Development Committee beyond special events
- b) Increase and strengthen the membership of the Development Committee to include individuals, both Board members and community volunteers, with a range of fundraising skills and experience
- c) Create an annual fundraising plan with clearly defined and segmented marketing strategies for funding new and existing initiatives and set priorities consistent with the strategic plan
- d) Recruit board members with an interest in fundraising activities; provide training and back ground to increase their effectiveness and enthusiasm

Milestones/Responsibility

- Add five additional members to the Development Committee by February 2008 (Executive Director and Board President)
- Develop a Fundraising Plan that provides for a diversity of funding sources by June 2008 (Executive Director and Board President)

2) Develop a plan and obtain funding for a development staff person in order to enable NAMI-MN to broaden its base of individual donors, increase the average donation, and build and sustain a cadre of donors contributing more than \$1,000 per year.

As part of this strategy, it will be necessary to:

- a) Identify leadership on the Board to fundraise for this new position and secure funders willing to help NAMI-MN make this important transition
- b) Develop a job description and build a list of prospective individual donors
- c) Increase the involvement of Board, staff and volunteers in intentional relationship building
- d) Provide training for Board, staff and volunteers to increase comfort in asking for large gifts from donors with the capacity to give at an increased level
- e) Develop an accurate and effective donor information management system to assist in making effective calls

Milestones/Responsibility

- Seek funds to support new development position by December 2007 (Board)
- Develop job description for development position and hire by December 2007 (Executive Director)
- Develop a work plan for the development position by March 2008 (Development Staff)

3) Identify and make connections with new donors who may not have given in the past or may be unfamiliar with NAMI-MN in order to increase individual contributions and broaden the current donor base.

As part of this strategy, it will be necessary to:

- a) Secure pro bono marketing assistance that supports the fundraising efforts
- b) Develop messages that clarify NAMI-MN's role in assisting individuals with mental illness who do not qualify for publicly-funded mental health programs or who rely on private insurance or private pay
- c) Recruit volunteers who can reach out to new donors and build relationships for and with NAMI-MN
- d) Reach out to prior participants in NAMI-MN programs such as Family-to-Family, Hope for Recovery, and Children's Challenging Behaviors, and invite them to support NAMI-MN and incorporate the "ask" as part of each program

- e) Reach out to new members who may join NAMI-MN as part of the recent merger of the Open Door anxiety disorders program
- f) Build awareness with and increase outreach to corporations, corporate foundations and individual executive donors
- g) Regularly assess the effectiveness of specific outreach strategies and revise annual development plan

Milestones/Responsibility

- Secure pro bono marketing assistance and develop messages that will encourage contributions from individual donors by July 2008 (Development Staff)
- Recruit 10 volunteers who will reach out to new donors on behalf of NAMI-MN by December 2008 (Development Staff)
- On an annual basis assess the effectiveness of outreach activities and incorporate changes into the staff development work plan (Development Staff)

4) Increase the effectiveness of online and other fundraising tools in order to provide additional ways for individuals to contribute to NAMI-MN.

As part of this strategy, it will be necessary to:

- a) Assign a staff member to learn about and manage the donor link on the website
- b) Promote memorial contributions with funeral homes and provide online donation capability
- c) Explore programs that make it easy and beneficial for individuals to provide for planned giving to NAMI-MN as part of their estate planning

Milestones/Responsibility

- Enhance the on-line contribution capability of NAMI-MN by March 2008 (Development Staff)
- Develop memorial materials for funeral homes by March 2008 (Development Staff and Executive Director)
- Inform 20 funeral homes of on-line donation capacity of NAMI-MN by July 2008 (Development Staff)
- Develop a recommendation to the board for a planned giving program for NAMI-MN by July 2008 (Development Staff)

5) Build on the success of the first NAMI-MN Walk in order to provide a Board and volunteer driven fundraiser that can finance activities and positions that are not supported by foundation and government grants and contracts.

As part of this strategy, it will be necessary to:

- a) Reach out to corporations (beyond healthcare and pharmaceutical companies) to build ongoing sponsors
- b) Build NAMI-MN member and affiliate enthusiasm for participation in the event
- c) Recruit a large number of volunteers and provide strong staff support
- d) Report the positive outcomes of the Walk to Walk participants

Milestones/Responsibility

- Hold a Walk annually in the Fall (Walk Manager)
- Evaluate the Walk annually and report the results widely to participants and affiliates (Walk Manager)

Goal 7 Accomplish NAMI-MN's vision through strong staff and volunteers

Background

Staff and volunteers (such as Board members, mediators, committee members, and office and fundraising event volunteers) are the heart of the organization and their passion and expertise will fuel the

accomplishment of the 2011 vision. Ensuring that volunteers and staff have the support, professional growth opportunities, and motivations they need to be most effective is a priority for the organization. NAMI-MN is entering a new life stage due to rapid financial and organizational growth in the past few years with a concurrent rise in staff and volunteers. At this point in the organization's development, there is a need to enhance communication both internally and externally, clarify roles and decision-making authority, and build in time for reflection and relationships in order to make the most effective use of staff and volunteers in meeting the needs of those it serves.

Strategies

1. Clarify staff culture, roles, structure and authority in order to most effectively use staff skills and potential.

As part of implementing this strategy it will be necessary to:

- a) Review and analyze job descriptions, reporting relationships, and current structure
- b) Ensure clear, regular communication
- c) Revise operation policies and procedures, draft checklists, and include in staff orientations
- d) Build in staff time for reflection and relationship building at staff meetings and as part of individual work plans
- e) Develop a succession plan to provide opportunities for staff members to take on other roles within the organization

Milestones/Responsibility

- Conduct regular bi-weekly staff leadership meetings beginning January 2007. Create quarterly self-evaluation on effectiveness. (Executive Director and Staff Leadership)
- Create simple checklists on practices and procedures. Clarify lines of reporting/authority by January 2008 (Executive Director & Volunteer Consultant)
- Update all staff job descriptions by January 2008 (Executive Director)
- Annually review structure, staffing, and Executive Director responsibilities with the Board in conjunction with the succession plan

2) Provide a useful and rewarding volunteer program in order to make the best use of and retain effective volunteers

As part of implementing this strategy it will be necessary to:

- a) Refine systems for recruiting, training, and retaining volunteers
- b) Improve all staffs' skills in delegation to and supervision of volunteers
- c) Improve procedures for working with and rewarding volunteers

Milestones/Responsibility

- Develop volunteer recruitment and retention plan by July 2007 (Volunteer Coordinator)
- Participate in one training on working with volunteers by January 2008 (All Staff)
- Conduct volunteer program evaluation by March 2008 (Volunteer Coordinator and Volunteer Committee)

3) Develop NAMI-MN's infrastructure in order to most efficiently support the work of board, staff and volunteers

As part of implementing this strategy it will be necessary to:

- a) Upgrade technological capacity to increase NAMI-MN's ability to track members, volunteers, donors, services, and projects
- b) Ensure systems such as IT, phones, time tracking, and database meet the increasing needs of staff and volunteers
- c) Establish budget and expand current fundraising plan to include dollars for technology

Milestones/Responsibility

- Develop an IT plan and budget by July 2008 (Executive Director & Associate Director)
- Incorporate budget into Board/staff fundraising plan by July 2008 (Executive Director)

4) Find new or additional office space in order to provide good working conditions for staff and volunteers

As part of implementing this strategy it will be necessary to:

- a) Work within the existing lease agreements
- b) Define space needs considering future growth needs
- c) Make a commitment beyond the current budget cycle

Milestones/Responsibility

- Secure new or additional office space by July 2008 (Ad Hoc Board Committee with Executive Director)
- As part of the annual planning process, project annual staffing needs for two to three years into the future and include related office space needs

5) Create ways for the Board Members to better understand NAMI-MN's operation in order to enhance their involvement and understanding

As part of implementing this strategy it will be necessary to:

- a) Provide NAMI-MN's Board with individual and group opportunities to experience and learn more about NAMI-MN internally and externally
- b) Build involvement opportunities into the Board orientation process

Milestones/Responsibility

- Continue an annual board orientation that provides an opportunity for staff to engage the board in understanding NAMI-MN work (Executive Committee. and Executive Director)
- Develop one simulation/case study that will engage the Board in the work of NAMI-MN at a meeting by January 2008 (Executive Director and Board Chair)

PROCESS SUMMARY

In June 2006, the NAMI-MN Board launched a strategic planning process designed to model the inclusive and interactive values of the organization and result in consensus on broad-based vision, goals, and strategies for the organization. The initial phase of the process included an extensive data collection process engaging NAMI-MN membership, individuals with mental illness, Board and staff, affiliates, key community supporters and legislators. Multiple data collection methods, such as surveys, interviews, phone conferences and focus groups, allowed stakeholders to be heard in a variety of ways. The data was summarized and presented at a Board and staff retreat in October 2006 to facilitate goal and strategies discussions (see Appendix A and B). In a second round of focus groups and interviews with key stakeholders, draft goals and strategies were presented to garner stakeholder's support and further refine the goals and strategies. The Board's Strategic Planning Committee has guided the strategic planning process since 2006. The Committee first convened in July 2006 and has worked together through the fall and winter to ensure the plan reflects the needs of the community and the wisdom of as many stakeholders as possible. Over the course of several months, NAMI-MN board members discussed the organization's stages of growth, emerging financial needs, and ways to meet increasing community expectations due to NAMI-MN's powerful reputation as the leading champion for people with mental illness in Minnesota. The following is a brief recap:

ORGANIZATION LIFE STAGE

NAMI-MN is at a critical juncture in its development. As a 30 year-old organization, its Stage One phase "Founding Stage" began in 1977 when it was formally organized as the Mental Health Advocacy

Coalition. It moved through several growth phases and spent time reassessing its future from 1999 to 2001. Under the leadership of Executive Director Sue Abderholden, NAMI-MN has experienced exceptional growth in reputation, outreach, financial size and numbers of employees and volunteers. Thus, the organization is experiencing a “growth spurt” in some areas of the organization and is also a mature, smoothly operating agency in others. In terms of organization life stage, these two stages are sometimes called the “Taking Care of Business” and “Automatic Pilot” stages. See attached Organization Life Stages graphic.

“Taking Care of Business” Stage (a time of growth)

NAMI-MN’s growth is occurring as a result of the increasing recognition of its excellent services and as a leading voice for mental health advocates in Minnesota. Its mission and programs have earned a reputation for distinctive competence and now, service demand exceeds its current structural and resource capabilities. This situation presents a complex management challenge and contributes to the atmosphere of “perpetual motion.” Typically in this stage, growth forces nonprofits to deal effectively (with continued adherence to mission) and efficiently (through development of internal systems) with the demands placed upon it. Therefore organizations:

- Begin to further refine services, processes, and procedures in ways that make that service more uniform and less dependent on specific individual staff and volunteers
- Managers begin to establish more structure and systems to deal with the numbers of new staff joining the organization and learn to delegate and put a sharper focus on their work
- The culture and communication style of the organization begins to formalize in response to the additional structure and demands for services
- Financially, this is an expensive stage in an organization’s development. Staff salaries are typically upgraded, space needs to be expanded and office equipment purchased—so diversifying revenues through greater attention to fundraising and managing cash flows tends to require much focus and energy

We can see the growth stage at work in NAMI-MN in these areas:

- The need to strengthen and organize NAMI-MN affiliates statewide in order to realize its full potential as a statewide organization
- The need to develop additional policies and procedures to enable staff to work efficiently and effectively with a clear vision of the organization’s mission and their own roles and responsibilities
- The need to build some systems required for strong support of increased numbers of staff and volunteers
- The need to develop back-up staff skills so they can assist one another in carrying out job responsibilities especially during periods of intense workloads

“Automatic Pilot Stage” (a mature stage)

Typically, organizations in the “automatic pilot” stage are well-established and have a community reputation for providing consistently relevant and high quality services. There is immediate name recognition and a sense of what the organization does and it is viewed as a leader in the development of its field. Mature organizations have well-functioning board of directors who govern rather than engage in operational tasks. The board has a stable membership that reflects the diversity of the people and community served. Staff and executive management roles and responsibilities are more structured and defined. There are ongoing and diverse sources of funding including foundation grants and government contracts, a growing membership base, a pool of established and generous repeat individual donors and established systems and policies are in place.

NAMI-MN demonstrates many of the characteristics of a mature organization including:

- It has been around a long time and has an excellent reputation
- Programs such as support groups and Family-to-Family are well known and have become part

of NAMI-MN's "brand"

- The organization is respected at the legislature and well-known as collaborative with their peers
- It has promoted a staff member to associate director and added many staff members with experience in needed skill areas
- NAMI-MN now has an experienced, diverse Board with a range of experiences that enables them to carry out their governance responsibilities in a way that provides sound leadership and wise guidance
- It is more effective at diversifying funding; building diverse and broad support from community, corporate and family foundations and making progress in picking up government contracts and larger individual donors
- The organization has significantly increased its budget and improved technology and systems, including establishing a bookkeeping system in the past two to three years

Annual Budget (Revenues & Support/Expenses)

- 1999: \$274,153 / \$267,954
- 2000: \$386,060 / \$265,031 -2%
- 2001: \$155,969 / \$231,759 -12%
- 2002: \$272,942 / \$266,465 +13%
- 2003: \$261,101 / \$332,885 +20%
- 2004: \$459,149 / \$358,336 +7%
- 2005: \$362,000 / \$361,000 +1%
- 2006: \$549,600 / \$548,120 +34%

ENVIRONMENTAL SCAN OF 2007

NAMI-MN's Executive Director provided a brief "environmental scan" of the mental health field in Minnesota and where NAMI-MN fits within that environment. She stressed that this has been and is the decade for addressing mental health issues: First there was the Surgeon General's Report on Mental Illness which found that neuroscience and neurochemistry underlies mental illness, mental illness is treatable, family self help is important and, most significant, there is hope for recovery. Then the New Freedom Commission on Mental Health: Achieving the Promise, emphasized the need to transform the mental health system. This was followed in Minnesota with the formation of the Minnesota Mental Health Action Group (MMHAG), a coalition seeking to transform mental health care in the state of Minnesota. Thus, this is an opportune time for NAMI-MN to further increase its activity and to grow statewide.

Several issues were identified that need attention from NAMI-MN:

- Needs of children are coming to light – school based services, screening, and juvenile justice
- Criminalization of people with mental illness continues
- Crisis, ER, and inpatient beds are short or inadequate
- Use of police as first responder to people with mental illness is sometimes a cause for concern
- Lack of affordable housing and employment supports are the rule rather than the exception
- Clear agreement on what people need to recover and participate in the community – no real funding streams for either short or long term care

The trends NAMI-MN should pay attention to are:

- Greater integration of mental health and health care
- The move away from a social service model to a health care model with some people needing additional social services; this could mean managed care, county-based purchasing
- Families have so little time – highest percentage of working moms in the country, too rushed, hard to attend events at night
- New immigrant communities – refugees – little support for their mental health needs
- Demand for quality, evidence-based practices – outcome definition and measurement

- Generational differences – young people have different needs and perspectives from their parents (e.g.: jobs need to be framed differently for the next generation)

Some opportunities that may be emerging for NAMI-MN include:

- The impact of upcoming elections with results that could require us to respond in many different directions; we need to be prepared.
- Some returning soldiers from Iraq are likely to have significant mental health issues.
- The ability to form coalitions with other mental health and health care groups and the need for more assistance in working legislatively on children's issues. No other organization has affiliates in counties statewide.

Within NAMI-MN there are many areas of the state that are untouched, including large population areas. From the Executive Director's point of view: It's clear that NAMI-MN has the opportunity to make big changes – good ones – in the mental health system if we dare ... we have plenty of areas for growth ... we can certainly move from good to great.

MONITORING AND UPDATES

The Board and staff of NAMI-MN are committed to ongoing monitoring and yearly updating of the strategic plan. In addition, the Executive Director will prepare an annual operational plan to highlight those strategic plan objectives to be addressed during the calendar year. In monitoring NAMI-MN progress, the Board will need to consider how well the overall or yearly goals in the plan were met and what contributed to or impeded progress to goal completion. The annual update process will include:

- A reassessment of opportunities and threats, strengths and weaknesses or challenges, and critical issues facing the organization
- A review of the vision, goals, and strategies
- Input from stakeholders such as members, staff, Board, funders, or community partners

Updates to the plan will reflect any changes or additions in goals and strategies, services and staffing and provide financial projections and implementation steps for the coming year.

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