

# **Strategic Plan**

2019-2022

**National Alliance on Mental Illness of Southern Arizona**

August 2019

## **Background**

The National Alliance on Mental Illness of Southern Arizona (NAMISA)'s Board of Directors developed the following three-year Strategic Plan during August 2019. Prior to the plan development, the Board requested an Organizational Capacity Assessment be completed by the Interim Executive Director. In addition, the previous strategic plan summary was reviewed. Two sessions were held in August 2019 during which the majority of Board members participated. Input from the staff and from the community Advisory Council was obtained and shared with the Board. The strategic planning process included creating a vision for the future, an analysis of the organization's strengths, weaknesses, opportunities and threats (SWOT), goal setting, as well as identifying actions steps and measures of success.

Reference materials included:

- Vision/mission/values handout
- NAMISA Strategic Plan May 2015-May 2018 Final Summary
- NAMISA Strategic Plan Report 2015
- Master Strategic Plan Project Calendar
- Development Committee Calendar
- Organizational Capacity Assessment 2019
- NAMI National Strategic Plan 2019

## **Review of mission, vision and values**

The Board reviewed the mission, vision and values created during the prior strategic plan. It was felt that the current mission, vision and values continued to be relevant and provided a strong foundation for the organization to continue to guide its program activities. One of NAMISA's strengths has been its ability to stay focused on its mission and live its values.

### **Our Mission**

NAMI Southern Arizona improves the quality of life for all those affected by mental illness.

### **Our Vision**

Southern Arizona is a stigma-free community in which abundant resources and support exist to ensure that everyone is healthy in body and mind.

### **Our Values**

#### **Acceptance**

- Everyone is important to us.
- We use person first language.
- We greet everyone warmly.
- We respect an individual's choice and path.
- We honor diversity.
- We recognize mental illness does not discriminate.

**Empathy**

- We create safe space.
- We listen.
- We understand the lived experience.
- We allow people to choose the solution that fits for them.
- We care.
- We are a supportive family.

**Hope**

- It starts with you.
- We share that it gets better.
- We educate.
- We give people tools to succeed.
- We support recovery.
- We communicate that the hope of recovery is 100%.

**Make a Difference**

- We advocate.
- We persevere and go the extra mile.
- We are a resource for all.
- We educate.
- We support with compassionate guidance.
- We reduce stigma.

**Vision**

- We talk about the future in a hopeful way.
- We collaborate with the community to make Southern Arizona a healthier place to live.
- We advocate so that resources are more easily accessible.
- We support policies that move mental health in a positive direction.

## Input from Advisory Committee

The Advisory Council met on September 6, 2019. The members reviewed three of the strategic goals proposed by the Board and offered suggestions including additional action steps toward attaining the goals.

- **FUND DEVELOPMENT**

1. Definitely find a way to qualify for the AZ Charitable Organization Tax Credit designation (maybe through data collected on populations impacted by HH4Y)
2. “What is a NAMI”? Find a way to consistently message and market that NAMI is the National Alliance on Mental Illness—make it very clear so that the community knows who we are
3. Improve the NAMI SA website to function more like the HH4Y website: (1) increase the value that visitors receive; (2) capture contact info data on visitors (before they can receive all the available valuable information that we could post) and (3) convert them to financial supporters via drip campaigns (develop a “squeeze page”)--(Ramon Valadez is familiar with what this is and how to do it); (4) have the “Donate” button appear on every tab
4. Pursue more grants in a systematic way; consider enlisting a donor(s) who would be willing to pool dollars to hire a grant writer to pursue higher dollar grant opportunities (Amelia Cramer had ideas on this)
5. Gather contact information e.g., NAMI Walk—(1) is there a way when folks sign up to be walkers that they can add contact info on ten “friends” who might be interested in joining the Walk? (2) definitely find a way to capture the contact information for everyone who signs up for the Walk either online or in person on the day and use to drip market (3) capture contact info of any contributors to any type of social media fundraising event that our donors may put together
6. Think about creating a subset of “organizational” donors that we could partner with that have like-minded goals such as pairing suicide prevention with gun violence prevention groups
7. Instead of trying to put on live educational programs that have not been that well attended in the past, record speakers and offer as free webinars (that require the capture of viewers contact information) and then drip to let them know how they can support NAMI SA
8. Use social media—great feedback on “Midweek Inspiration” local content—make sure there is a link so viewers who receive this content via email can donate

9. NAMI Nat'l education programs—seek to make them available online, capture contact information of viewers and convert them to financial supporters
10. Future fundraising events—explore the idea of collaborating with other non-profits to organize such an event to spread out the work and share in any profits (current NAMI SA staff & volunteers are spread too thin to put on any such events at this point)
11. Make it easy for people to donate to NAMI SA and make the ask in as many ways as possible on the website, social media, at events, etc. Make it clear that donors are supporting the local affiliate and programs right here in Southern Arizona to differentiate us from NAMI National.

- **Advocacy and media plan**

Legislation:

- Title 36/ Court ordered treatment: advocate for state allowing for co-occurring addiction be able to be court ordered for treatment
- Need for supportive housing to fill gap between therapeutic housing and independent housing. Permanent housing that offers support but is nonclinical such as group housing where there is help cooking/cleaning and offers social interaction vs own apartment. No funding. Camelback Recovery may be model

Other

- Continuity of care for individuals in jail. AHCCCS suspended when incarcerated. Can take 30 days to reinstate after release so gap in access to care. Suggests AHCCCS cover care in jail so no gap
- Patient choice can lead to individuals shopping providers, which can be unhelpful for quality of care. Minimal regulation of providers treating substance abuse. Suggest regulations to address quality of care

- **Communication/marketing**

## SWOT Analysis

### Strengths

<ul style="list-style-type: none"> <li>• <b>Large number of participants</b></li> <li>• <b>Dedicated volunteers and staff/ passion</b></li> <li>• <b>Quality programs</b></li> <li>• Support groups/ locations</li> <li>• Unique Services</li> <li>• <b>Serve everyone and at no charge</b></li> <li>• State and National NAMI support</li> <li>• <b>Strong media relations (KOLD, AZPM)</b></li> <li>• Access to programs through National</li> <li>• Active, functional Board</li> <li>• Mission drives activities</li> </ul>	<ul style="list-style-type: none"> <li>• Who do we reach? Unknown</li> <li>• Programming not well understood in community</li> <li>• <b>Funds and fundraising</b></li> <li>• Facilitators not supported well</li> <li>• <b>Lack of data (collection and use)</b></li> <li>• <b>Lack of marketing/ consistent messaging</b></li> <li>• Recruit/train volunteers, grassroots organizing</li> <li>• Noncompetitive staff compensation</li> <li>• Staff training</li> <li>• Location of office</li> <li>• <b>Lack of management infrastructure and leadership (need new ED)</b></li> <li>• Static membership #</li> </ul>
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### Weaknesses

### Opportunities

<ul style="list-style-type: none"> <li>• AZ tax credit</li> <li>• Financial planning/budgeting</li> <li>• Program expansion (ETS, NAMI Basics, NAMI HomeFront)</li> <li>• New ED recruitment to shape NAMI SA</li> <li>• AHCCCS Works could increase # volunteers and recipients</li> <li>• Internships</li> <li>• Visibility of mental illness/issues</li> <li>• Offer targeted solutions</li> <li>• Potential funding increase through development planning</li> <li>• Partner w/ community organizations- first responders, law enforcement, TC3, BH providers</li> <li>• Create/tailor programs to community</li> <li>• Collaborate with primary care</li> <li>• Partner on administrative processes</li> <li>• Improve donor management</li> <li>• Survey community eg at WALK</li> <li>• Develop strategic data collection process</li> <li>• Changes in BH delivery system re: funding for SMI services</li> <li>• City/County planning participation</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of consistent funding sources</li> <li>• Lack of diverse funding sources</li> <li>• Noncompetitive re workforce recruitment (health, retirement, salary)</li> <li>• Over reliance on volunteers for administrative tasks</li> <li>• Volunteers lacking support from staff</li> <li>• Picking “wrong” ED</li> <li>• Lack of local branding</li> <li>• Failure to brand/market</li> <li>• Lack of data for fundraising</li> <li>• Recession</li> <li>• Lack of legislative advocacy</li> </ul>
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### Threats

## Strategic Initiatives

### Goal 1: Improve internal structure and management processes including systems to support volunteers

Objectives	Action Steps	Person(s)	Beginning date	Completion date	What is success?
Develop comprehensive Human Resource Policies & Procedures including a compensation plan	<ol style="list-style-type: none"> <li>1. Review/ revise current P&amp;Ps</li> <li>2. Review organizational chart. Restructure/ redefine roles</li> <li>3. Review comparable salaries/ benefits and define plan for going forward</li> <li>4. Create training and continuing education plan for positions including employment and supervisory skills and performance management</li> </ol>	Betty and ED Governance Committee	9/2019	6/2020	<ol style="list-style-type: none"> <li>1. Revised HR P&amp;Ps approved by BOD (10/19)</li> <li>2. Competitive compensation plan approved by BOD</li> <li>3. Training resources available to staff</li> </ol>
Develop volunteer management guidelines	<ol style="list-style-type: none"> <li>1. Hire Volunteer Coordinator</li> <li>2. Create appreciation plan with support activities</li> <li>3. Create new volunteer orientation and ongoing training modules</li> </ol>	Julie and ED	9/2019	3/2020	<ol style="list-style-type: none"> <li>1. coordinator hired</li> <li>2. Appreciation plan approved by BOD</li> <li>3. Volunteer management policies implemented</li> </ol>
Explore sharing administrative functions with another nonprofit agency	<ol style="list-style-type: none"> <li>1. Evaluate relevant administrative functions and determine current cost</li> </ol>	Treasurer and Finance Committee	10/2019	10/2020	<i>Reduction in cost of administrative functions</i>

	2. Explore local nonprofit agencies for partnership opportunities				
Develop comprehensive financial planning process	<ol style="list-style-type: none"> <li>1. Written financial procedures</li> <li>2. Define Treasurer role</li> <li>3. Create bookkeeper job description and determine hours needed</li> <li>4. Establish BOD process for annual budget review</li> </ol> Coordinate plan with fundraising plan	Treasurer and Finance Committee	9/2019	10/2020	<i>Annual audit with minimal recommendations</i>

**Goal 2: Create comprehensive fund development plan**

<b>Objectives</b>	<b>Action Steps</b>	<b>Person(s)</b>	<b>Beginning date</b>	<b>Completion date</b>	<b>What is success?</b>
Implement an effective donor management system	<ol style="list-style-type: none"> <li>1. Implement Trailblazer</li> <li>2. Use system to communicate marketing messages agency wide</li> </ol>	ED	9/2019	12/2019	<ol style="list-style-type: none"> <li>1. <i>System has complete information</i></li> <li>2. <i>Staff are trained and using system</i></li> </ol>
Develop diverse income streams that sustain programs and administrative structure, and creates opportunities for growth	<ol style="list-style-type: none"> <li>1. Write an annual comprehensive fundraising plan including defining necessary staff roles/ outside consultants</li> <li>2. Develop messaging distinguishing NAMI SA/ National NAMI for donations</li> </ol>	Mary Ann ? Development Committee	9/2019	10/2020	<ol style="list-style-type: none"> <li>1. <i>Revenue increase of 10% annually for the next 3 years</i></li> <li>2. <i>NAMI SA receives AZ Tax Credit donations from 25 individual/ \$10,000</i></li> </ol>

	<p>3. Obtain AZ Charitable Organization Tax Credit designation</p> <p>5. <i>Improve website to capture contact information, increase value, donate button on every page, drip info</i></p>	<p><i>Use Catch A Fire grant?</i></p>			
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**Goal 3: Improve communication/ messaging/ marketing within the local community**

<b>Objectives</b>	<b>Action Steps</b>	<b>Person(s)</b>	<b>Beginning date</b>	<b>Completion date</b>	<b>What is success?</b>
Create messaging of who we are and what we do	<ol style="list-style-type: none"> <li>1. Reset NAMISA to NAMI of Southern Arizona</li> <li>2. Create versions of message for <ul style="list-style-type: none"> <li>- membership</li> <li>- donors</li> <li>- program marketing</li> <li>- media</li> <li>- legislators/ state actors</li> <li>- social media</li> </ul> </li> <li>3. Coordinate with State and other local affiliates</li> <li>4. Create "card" with role of national, State and local affiliates for donors</li> <li>5. Improve website as public service e.g. crisis service decision tree</li> <li>6. Disseminate information about NAMISA programs at crisis access points</li> </ol>	Eric Development/ Marketing Committee	9/2019	3/2020	<ol style="list-style-type: none"> <li>1. <i>Member donations increase by 25 %</i></li> <li>2. <i>Monitor and increase website traffic</i></li> <li>3. <i>Increase advocacy requests by 10%</i></li> </ol>

Create marketing plan to increase activity and consistency in messaging	<ol style="list-style-type: none"> <li>1. Define who to target with messages</li> <li>2. Social media plan</li> <li>3. BOD role/ activities re marketing</li> <li>4. Write marketing plan</li> <li>5. Develop additional PSAs</li> <li>6. Explore partnerships for messaging</li> <li>7. Coordinate activities with NAMI Walk and fundraising plan</li> </ol>	Julie, Marsi and Christina Development/ Marketing Committee	11/2019	10/2020	<ol style="list-style-type: none"> <li>1. Membership doubles in 3 years</li> <li>2. Participation in programs increases 10%</li> <li>3. Social media "followers" increases 5%</li> <li>4. "Hits" on website increases 25%</li> <li>5. Donations increase after tabling/ outreach event</li> </ol>

**Goal 4: Create legislative and local government advocacy and media plan**

Objectives	Action Steps	Person(s)	Beginning date	Completion date	What is success?
AZ legislation addresses stigma reduction and mental health education/ service funding	<ol style="list-style-type: none"> <li>1. Actively participate in AZ legislative session 2021</li> <li>2. Identify National, State and local legislators and chiefs of staff</li> <li>3. identify opportunities to provide information (bipartisan)</li> <li>4. Identify who is sponsoring relevant bills in 2020 session</li> <li>5. Create system for tracking current legislation</li> </ol>	Matt and Dave Advocacy Committee	9/2019	6/2021	<ol style="list-style-type: none"> <li>1. One bill proposed to fund stigma reduction and/or mental health education</li> </ol>

	6. Learn from OHIO NAMI re obtaining funding 7. Coordinate with National for advocacy support 8. Clarify 501(C)3 rules and educate BOD 9. Develop messaging campaign plan				
Education people on how to advocate	1. Conduct NAMI Smarts classes	Eric and Dave	10/2019	9/2022	1. 30 individuals complete the classes 2. Two classes held each year
Establish relationships with local government and community organizations and media	1. BOD identify who with new ED 2. Establish process for media contacts including press releases	Laura and new ED	1/2020	1/2021	1. ED reaches out to all Pima Council members in first year 2. Press release occurs after 80% of relevant public events

**Goal 5: Develop evaluative capacity with strategic data collection based on growth plan**

Objectives	Action Steps	Person(s)	Beginning date	Completion date	What is success?
Have readily available data that demonstrates the value and impact of the programs on fulfilling NAMI Southern Arizona's mission	1. BOD define purposes/uses of data and data needed 2. Identify current data collected 3. Create data collections processes and tools 4. Identify NAMI 360 data/ reports available				

Actively use data to drive growth	<ol style="list-style-type: none"><li>1. BOD will define key performance indicators to review</li><li>2. Program snapshots reviewed</li></ol>				<ol style="list-style-type: none"><li>1. BOD reviews key performance indicator dashboard at least quarterly</li><li>2. One program staff presents program and data at BOD monthly</li></ol>
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## **Conclusions**

NAMISA has a unique and important role in the community. The NAMISA Strategic Plan 2019-2022 capitalizes on the organization's strengths to address its most significant weaknesses related to infrastructure and fund development necessary for sustainability. The Plan also addresses the need for information (data) to effectively market its programs and services. In addition, the Plan takes advantage of the opportunities available in the current national and local environments where mental illness and mental health issues have become much more visible.

The Board will establish an ongoing review process. It is recommended that the full Board review progress at least quarterly. The Board Strategic Committee will have the primary role of stewarding the plan during the next three years. Other Board Committees will be responsible for carrying out the action steps for each of the strategic goals in collaboration with the Executive Director and other designated staff.