2019 – 2022
Strategic Plan

Approved December 2018
NAMI VIRGINIA STRATEGIC PLAN  
2019-2022

With the input of affiliate leaders and other stakeholders, during 2018 NAMI Virginia’s Board of Directors and staff worked collaboratively to develop the following four goals which we believe will advance our mission work of support, education and advocacy over the three-year period of this plan. In the pages of this document, we have detailed the objectives and action steps we will take to achieve these goals.

**Goal 1: Governance and Management.**  NAMI Virginia shall be a sustainable organization through effective governance and oversight.

**Goal 2: Financial Sustainability.**  NAMI Virginia shall strive to be financially sound.

**Goal 3: Advocacy.**  NAMI Virginia shall influence public policy and perception of mental illness by enhancing our impact in advocacy and awareness.

**Goal 4: Marketing and Expansion.**  NAMI Virginia shall increase its presence in communities throughout the Commonwealth.

**MISSION**

Our mission is to promote recovery and resiliency and improve the quality of life of individuals and families affected through support, education, and advocacy.

**VISION**

We envision a world where all individuals and families affected by mental health conditions get the help, hope, and support that they need.
Goal 1: Governance and Management. NAMI Virginia shall be a sustainable organization through effective governance and oversight.

Staff lead for Goal 1 Implementation: Executive Director

OBJECTIVE 1.1
Ensure a consistently effective and engaged Board of Directors.

Action Steps
- Build a board recruitment strategy which will form a strong pipeline of potential board members by using a board matrix and board expectation sheet.
- Review, update and implement the board orientation process annually.
- Create a board leadership succession plan, using an interest survey and other tools.
- Review and update board committee structure to reflect needs as outlined in the strategic plan annually or as needed.
- Evaluate and implement board best practices annually to identify ones that might serve our need (mission moment, consent agenda, executive session, and dashboards).

Outcomes: To be determined by staff.

OBJECTIVE 1.2
Ensure on-going Board compliance.

Action Steps
- Review progress on the strategic plan semi-annually and make changes as needed.
- Review key governing documents and policies annually and update as needed.
- Review by-laws biennially and make changes as needed.
- Develop and implement an annual process to evaluate board members’ individual contributions, and to evaluate board operations and effectiveness as a whole.
- Comply with Generally Acceptable Accounting Principles (GAAP).

Outcomes: To be determined by staff.

OBJECTIVE 1.3
Provide a fulfilling work environment at NAMI Virginia.

Action Steps
- Evaluate staffing and compensation needs annually based on programmatic and operational priorities.
- Review and update the existing staff performance review process.
- Ensure ongoing discussion about NAMI Virginia’s “office culture” to promote a staff needs for support and development.
- Review and update staff policies and employee manual annually.
- Prioritize professional development and assess staff development needs annually.
- Create a staff succession plan for the Executive Director and key staff positions and review/update annually.
- Review annually the software and technology needed to advance NAMI Virginia’s mission.

Outcomes: To be determined by staff.
Goal 2: **Financial Sustainability.** NAMI Virginia shall strive to be financially sound.

*Staff lead for Goal 2 Implementation: Executive Director and Finance Director*

**OBJECTIVE 2.1**  
Diversify revenue sources.

**Action Steps**
- Develop and update fund development plan and calendar annually.
- Ensure an active Board Development Committee.
- Review current donor base and our donor motivation strategies annually.
- Review our fund development staffing structure.
- Develop a case for financial support of NAMI Virginia and how our services and impact differ from that of our affiliates using programmatic outcome data.
- Investigate the development of a Planned Giving program.

**Outcomes:** To be determined by staff.

**OBJECTIVE 2.2**  
Ensure transparency in financial operations.

**Action Steps**
- Maintain updated Give Richmond profile.
- Complete an annual audit and provide to the public as requested.
- Develop a policy to guide joint fundraising with affiliates.

**Outcomes:** To be determined by staff.

Goal 3: **Advocacy.** NAMI Virginia shall influence public policy and the perception of mental illness by enhancing our impact in advocacy and awareness.

*Staff lead for Goal 3 Implementation: Executive Director*

**OBJECTIVE 3.1**  
Refine legislative and lobbying initiatives.

**Action Steps**
- Continue to maintain our lobbyist, and work with him to develop a multi-year plan of advocacy priorities.
- Develop adult and child mental health policy platforms and review/revise annually to clarify our positions and public response.
- Continue educating legislators on the value of NAMI Virginia and the needs of people affected by mental illness.
- Inform legislative and policy priorities by obtaining feedback members and other stakeholders.
- Expand the board’s Public Policy Committee to include non-board members.
Outcomes: To be determined by staff.

**OBJECTIVE 3.2**
Enhance our ability to inform and mobilize our grassroots members and partners in advocacy.

**Action Steps**
- Develop grassroots advocacy guidelines for Model A & B affiliates.
- Develop training and other resources to enhance membership engagement in advocacy initiatives.

Outcomes: To be determined by staff.

**OBJECTIVE 3.3**
Develop a marketing and communications plan

**Action Steps**
- Engage a consultant to create an internal and external marketing and communication plan that honors and respects our vision, mission and guiding values such as “person first” and strengths-based language.
- Ensure marketing and communication plan reflects the needs of diverse cultural communities.
- Ensure marketing and communication plan are assessed annually to identify strategic areas for growth or increased capacity.
- Utilize NAMI Virginia’s marketing and communication plan to offer guidance to NAMI affiliates.

Outcomes: To be determined by staff.

**OBJECTIVE 3.4**
Develop a membership outreach and retention plan.

**Action Steps**
- Develop an ad hoc committee to determine benefits of NAMI Virginia membership.
- Develop and implement a membership engagement strategy to include feedback from board members and affiliate leaders, and reassess annually.
- Work to enhance the diversity of our membership.
- Build our capacity to hold a state convention within the next three years.
- Utilize NAMI Virginia’s outreach and retention plan to offer membership retention guidance to NAMI affiliates.

Outcomes: To be determined by staff.
**Goal 4: Marketing and Expansion.** NAMI Virginia shall increase its presence in communities throughout the Commonwealth.

*Staff lead for Goal 4 Implementation: Assistant Director, Program Directors*

**OBJECTIVE 4.1**
Enhance current affiliate sustainability.

**Action Steps**
- In collaboration with affiliates, develop targeted trainings, resources and technical assistance, and revisit offerings annually.
- Enhance internal communication between NAMI Virginia program staff to keep staff updated on affiliate activities and needs.

**Outcomes:** To be determined by staff.

**OBJECTIVE 4.2**
Expand NAMI Virginia’s presence in geographic areas without affiliates.

**Action Steps**
- Investigate strategies and tools to inform our thinking about expanding NAMI’s mission into areas without affiliates.
- Develop, in accordance with NAMI guidelines, resources to promote new affiliate growth.
- Include an intentional focus on diverse cultural and linguistic community needs.

**Outcomes:** To be determined by staff.

**OBJECTIVE 4.3**
Evaluate current program offerings for scope and appropriateness.

**Action Steps**
- In collaboration with affiliate leaders, increase understanding of community priorities for NAMI signature, non-signature, and other non-NAMI programming.
- Develop and evaluate program data dashboard to identify potential areas of concern in existing programming.
- In collaboration with the Board of Directors, the Virginia Family Network Advisory Board, and the Youth MOVE Virginia Advisory Board, identify programming needs.

**Outcomes:** To be determined by staff.
OBJECTIVE 4.2
Create evaluation measurements and outcomes to better demonstrate our programmatic impact.

**Action Steps**
- In partnership with a consultant, train staff to develop program objectives, use measurement tools, and develop databases for program evaluation and effectiveness.
- Establish target goals for each major program/task and track in the NAMI Virginia data dashboard.
- Develop a procedure for obtaining and evaluating qualitative data from program participants (e.g., mission moments, stories) and evaluate annually.

**Outcomes:** To be determined by staff.