

# 2008 Annual Report





# Executive Director's Message

*By increasing knowledge and emotional awareness, family coping skills improve, and children and adolescents with emerging and diagnosed mental illness achieve better home, school and life outcomes.*

As NAMI celebrates its 30th anniversary in 2009, we continue to move “from good to great” on a strategic plan that relies on three main principles: support, education and advocacy. In 2008, NAMI made benchmark progress in many areas: affecting health care, reaching out to new corners of the country on a grassroots level, expanding educational programs and communicating NAMI's message to media and cultural outlets.

On Oct. 3, 2008, President Bush signed the Paul Wellstone-Pete Domenici Mental Health Parity and Addiction Equity Act of 2008 into law, requiring that mental illness be treated like a medical illness in health insurance plans. It was a huge victory for NAMI, and a day of celebration: years of hard work had at last achieved a cherished goal. NAMI continues to represent the voices of grassroots Americans to Congress and other public policy leaders for people with mental illness, including priorities such as funding for treatment, support, services, housing and create scientific research.

In 2008, the NAMI Web site received more than 7 million visitors. The e-join initiative launched in 2007 showed impressive results: by year's end, we gained roughly 8,000 members. The HelpLine fulfilled more than 60,000 requests for support and information and also saw a 57 percent quarterly increase in Spanish calls and e-mails. NAMI has produced public service announcements, videos and other materials to educate the public that mental illnesses are illnesses like any other. We have continued to build on our relationship with the FOX TV show *House*, which has raised money and awareness from its fan base.

NAMI worked hard to continue the expansion of all education courses—Peer-to-Peer, Family-to-Family and In Our Own Voice—into new and more diverse communities to build on the success of NAMI's education efforts. More than 200,000 graduates have benefited. The Family-to-Family program worked closely with the Department of Veterans Affairs (VA) to bring the program to VA facilities in every state. By the end of 2008, NAMI initiated Family-to-Family trainings in 22 VA hospitals, and this effort will continue in 2009. We also are looking at ways to bring NAMI Connection, our recovery support group program, into VA facilities.

NAMI also expanded efforts through the distribution of *Parents and Teachers as Allies*, a publication and in-service program for teachers and educators to help them understand the needs of students living with mental illness.

The NAMI Basics education program, a program focused on caregivers of children, was launched in 2008 and is now in 18 states. The much-anticipated, new signature program for parents and other caregivers of children and adolescents living with mental illness has been warmly embraced. There are now 26 state trainers and 314 trained teachers. By increasing knowledge and emotional awareness, family coping skills improve, and children and adolescents with emerging and diagnosed mental illness achieve better home, school and life outcomes.

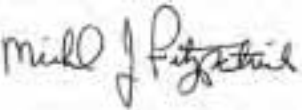
In 2008, NAMI was also busy raising awareness through our innovative NAMIWalks, which will expand to 79 walks communities. NAMIWalk was voted recently as one of the fastest growing walks in America. Thousands of Americans have walked in a NAMIWalk for mental illness and NAMI.

NAMI's fourth annual Research Gala, "Unmasking Mental Illness," was held at the historic Andrew W. Mellon Auditorium in Washington, D.C., last October, was a resounding success. A highlight of the evening was the award of The Mind of America Scientific Research Award to Judith L. Rapoport, M.D., chief of the Child Psychiatry branch at the National Institute of Mental Health (NIMH). Music was provided by Joyce Cooling, a dynamic and popular contemporary jazz guitarist, whose brother lives with schizophrenia. She donates a portion of her CD sales to NAMI.

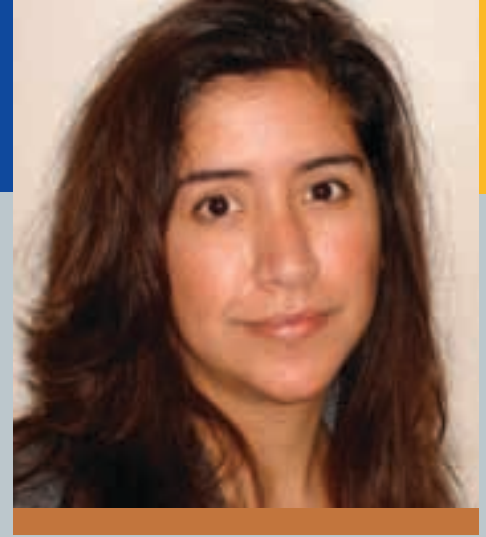
On the recommendation of our auditors, NAMI moved its fiscal year budget to match the calendar year in 2008, which makes things easier from an accounting perspective. In this annual report, you will see two financial statements and two auditors' letters; each set represents two different periods. Our former fiscal year budget ran from July 1, 2007 through June 1, 2008. Our new calendar year format reflects July 1 through Dec. 31, 2008. The information in this annual report spans the total time period of July 1, 2007 through Dec. 31, 2008.

In 2009, we renew our commitment to provide support, education and advocacy on behalf of the millions of Americans who live with mental illness. We hope you will join us in meeting the challenges we face now and in the years ahead. Our 30th anniversary is a time for rededication to NAMI's mission.

Sincerely,



Michael Fitzpatrick, M.S.W.  
Executive Director



## *I am NAMI*

**Julissa Viana**

**Board Member, NAMI NYC Metro**

I first found NAMI when I was searching for information on schizophrenia. My older brother had been hospitalized and was on suicide watch—it was his first of many psychotic episodes. I was overwhelmed and didn't know where to turn, so I turned to NAMI.

The NAMI NYC affiliate helped me locate a case manager and navigate the process of securing housing when my brother was discharged. They put me in contact with health care providers who helped find the right treatment and support services to stabilize his symptoms. When my brother went missing in Florida, I turned to NAMI's local affiliate who directed me to resources to help search for him. When he was arrested in Oregon, I turned to NAMI to find a local lawyer. NAMI was there when my brother wanted to go back to work but didn't have the necessary office skills. He volunteered at the NYC chapter to learn basic clerical skills and reclaim dignity he felt was left behind with his illness. Unfortunately, my brother lost his battle to schizophrenia. He took his own life five years ago.

My NAMI friends were there to grieve with me and help me find new purpose in fighting for those who can not always fight for themselves. Now, it's my turn to give back to NAMI. My work as a board member for the NAMI NYC and Rockland County affiliates has allowed me to help others navigate the often-fragmented mental health system. Together, NAMI and I are making a difference in providing support, education and advocacy to help people understand mental illness. I always say, schizophrenia was an illness my brother had, not who he was. I am grateful for the kindness and support from NAMI, and I am proud to be helping NAMI give others a place to turn.





## I am NAMI

### Sharon Gartrell NAMI Memphis

Since childhood, my life has been peppered with emotionally crippling secrets. Nightmarish incidents, like severe abuse, were locked away in my mind and forgotten. Decades later, they resurfaced. During my dysfunctional childhood, borderline personality disorder (BPD) as well as posttraumatic stress disorder (PTSD) symptoms began developing.

Years later, during my military career, many incidents occurred causing my symptoms to worsen. I was ridiculed, at times, by my peers and subordinates. I was also sexually abused. Although I served over 21 years in the U.S. Army, my mental disorder crippled my career. I was diagnosed with chronic depression and decided to retire early.

During the early years of my retirement, I was diagnosed with BPD and PTSD. My mother believed that my mental illness and alcoholism came from my father's side of the family. My family could not fathom my irrational behavior.

My mother misunderstood me until she attended a Bridges Family Support Group at St. Francis Hospital in Memphis, Tenn. She and her late husband volunteered and helped at two NAMIWalks. Through NAMI, my mother and I are well-informed about my disorders and their symptoms. Our relationship has blossomed.

NAMI Memphis has helped teach me how to live, recognize and work through my symptoms. I hold many positions in these life-saving organizations. I will forever remain an active NAMI member.

# July 2007- December 2008: A NAMI Timeline

## August 2007:

Following the Virginia Tech tragedy, NAMI helps focus reform efforts on the state's mental health care system.



The third annual Crisis Intervention Team (CIT) Conference meets in Memphis, Tenn.

## September 2007:

NAMI's newest signature education program, NAMI Basics, launches with teacher trainings in pilot states Illinois, Utah and South Carolina. NAMI Basics was developed specifically to address the needs of parents and other family caregivers

of children and adolescents with mental illness. NAMI Basics is now in 20 states, with six more being trained in 2009.

NAMI begins a Cultural Competence self-assessment to meet the needs of culturally and linguistically diverse communities.

## October 2007:

Retired U.S. Navy Captain Constance Walker, president of NAMI Southern Maryland and a member of NAMI's National Veterans Council, testifies for NAMI before the U.S. Senate Committee on Veterans' Affairs.



The third annual NAMI research gala, "Unmasking Mental Illness," is held in Washington, D.C. The 2007 NAMI Mind of America Scientific Research Award was presented to A John Rush, M.D., for his lifetime contribution to the study of depression.

## November 2007:

To help support active duty military personnel, veterans and their families confronting mental illness, NAMI establishes an online Veterans Resource Center, [www.nami.org/veteran](http://www.nami.org/veteran).

## December 2007:

NAMI's seventh annual Leadership Conference, "Bridging the Three Levels of NAMI," was held in New Orleans and included a focus on building capacity and advocacy skills.

## January 2008:

U.S. presidential candidates answer a mental health care questionnaire conducted by NAMI.



#### February 2008:

The NAMI Connection Recovery Support Group program, in 16 states at its one-year mark, celebrated its first anniversary. The

program offers adults living with mental illness a free, weekly support group as a place that offers respect, understanding and hope.

#### March 2008:

NAMI released the proceedings document of the NAMI Gay, Lesbian, Bisexual and Transgender (GLBT) Listening Session. Drawing on the issues discussed, the resulting proceedings document provided both long- and short-term goals for NAMI to move forward with GLBT inclusion.

#### April 2008:

*Women and Depression* is published by NAMI, another addition to its core publications series. The self-help brochure discusses causes, symptoms, life stages and treatment options.

#### May 2008:

NAMI Medical Director Ken Duckworth, M.D., discussed depression as part of a panel of experts moderated by broadcast journalist Jane Pauley on *Take One Step: Caring for Depression with Jane Pauley*. The program was broadcast on PBS stations nationwide and immediately followed the national premiere of the PBS documentary *Depression: Out of the Shadows*.

NAMI honored 30 doctors as exemplary psychiatrists at the annual conference of the American Psychiatric Association (APA). The annual Exemplary Psychiatry Awards recognize psychiatrists who have "gone the extra mile" in providing excellent clinical care, educating family members and consumers, educating the public and helping to reduce stigma surrounding mental illness.

The U.S. House of Representatives established the Bebe Moore Campbell National Minority Mental Health Awareness Month, designated as July. The late Bebe Moore Campbell was a NAMI national spokesperson and one of the nation's leading African American authors.



## I am NAMI

### Carol Howe, Jim Howe Founding NAMI members

My husband, Jim, and I have four wonderful children. Two of them were diagnosed with schizoaffective disorder. Because our sons became ill in the '60s, they have lived most of their lives with a mental illness. Today, they are even more wonderful because they have lived through it and have recovered in many ways.

In the late '70s we, as a family, knew we needed help. Our sons with mental illness needed it, we needed it and society needed it. We had to know all there was to know about these devastating illnesses. What were the foremost scientists telling us? Where were the complete community support systems? Where could our sons find services? We knew that we would have to change the communities where we lived, needed to get the best information available and had to educate families, persons with mental illness, the general public and sometimes even professionals.

Jim and I helped form the National Alliance for the Mentally Ill (today, the National Alliance on Mental Illness): NAMI. We needed to learn how to advocate, to know who our friends in Congress were as well as the best researchers. We also helped form the best private research organization: NARSAD.

One of our sons is successfully married and works part-time. The other does volunteer work several days a week. They are members of a psychosocial rehabilitation community called Way Station in Frederick, Md. Way Station has helped many people with diagnoses such as bipolar disorder, schizophrenia, schizoaffective disorder, anxiety disorder, depression, obsessive-compulsive disorder, posttraumatic stress disorder, borderline personality disorder and more.

We have talked with many troubled families and persons with the illnesses through NAMI, and we assure them that the horror of living with these devastating illnesses will go away, and that they can gain strength by learning all they can and helping other people. NAMI folks are kind, loving folks, and they've been through it themselves!



## I am NAMI

**Sarah O'Brien**  
**Program Director,**  
**NAMI's Peer-to-Peer Signature**  
**Education Program**

Twelve years ago, I didn't think that recovery from mental illness was possible. I found myself in the psychiatric ward of a hospital, unable to read or write, afraid of my family and afraid of life all due to a chronic illness that completely incapacitated me. There seemed like there was no hope.

Now it feels like I've walked into the best dream possible. After being chased by the demons of my own mental illness for so many years, I am now empowered to extend a hand to others facing the same kind of fear and helplessness I did for so long. It is an honor to share in the transformation of my peers that participate in NAMI programs. We evolve, tell our stories, and gather new tools to stay well. We find empathy, learn trust and gain new self respect and dreams for our futures. What better job is there than to contribute to the positive growth of any individual, knowing the ripple effect it has in the rest of the world?

I received my B.A. from Goucher College in 2001, and worked as the coordinator of consumer programs for her local NAMI office (Montgomery County, Md.) from 2004-05. In 2006, I became NAMI National's In Our Own Voice (IOOV) Program Director. During my first two years as IOOV Director, the program achieved significant growth and expansion. Today over 50,000 people attend an IOOV presentation each year, witnessing phenomenal stories of inspiration and hope. I embarked on my journey as Peer-to-Peer Program Director in the summer of 2008, and have now taught and certified over 60 Peer-to-Peer mentors and 20 state trainers.

It was through my own experiences with bipolar disorder that I developed a passion for serving others. My experiences of the depths of despair, and transcending those depths, infuse me with passion—a passion I can turn into action by working at NAMI. Today, I am committed to breaking down the stigma associated with mental illness and helping anyone I meet succeed.

# July 2007- December 2008: A NAMI Timeline, *continued*

### June 2008:

NAMI's Multicultural Action Center sponsors sessions at the NAMI's 2008 Convention in Orlando on the American Indian and Alaska Native populations and inclusion of the GLBT community.

NAMI advocates mobilized nationwide to persuade the U.S. Congress to preserve the ability of states to fund critical mental health services through Medicaid.

NAMI released *Schizophrenia: Public Attitudes, Private Needs*, a report based on a survey that showed that while schizophrenia was twice as common as HIV/AIDS, Americans were generally misinformed and/or unaware of the illness.

The report also revealed that while approximately two million Americans live with schizophrenia, two-thirds do not receive treatment.

A Memorandum of Understanding between Veterans Health Administration (VHA) and NAMI was signed to establish a Family-to-Family Education Program in one VHA facility in each of the 49 states that have the program.

### July 2008:

NAMI called for a criminal probe surrounding the tragic death of Esmin Elizabeth Green of Kings County, N.Y., who died in an emergency waiting room.

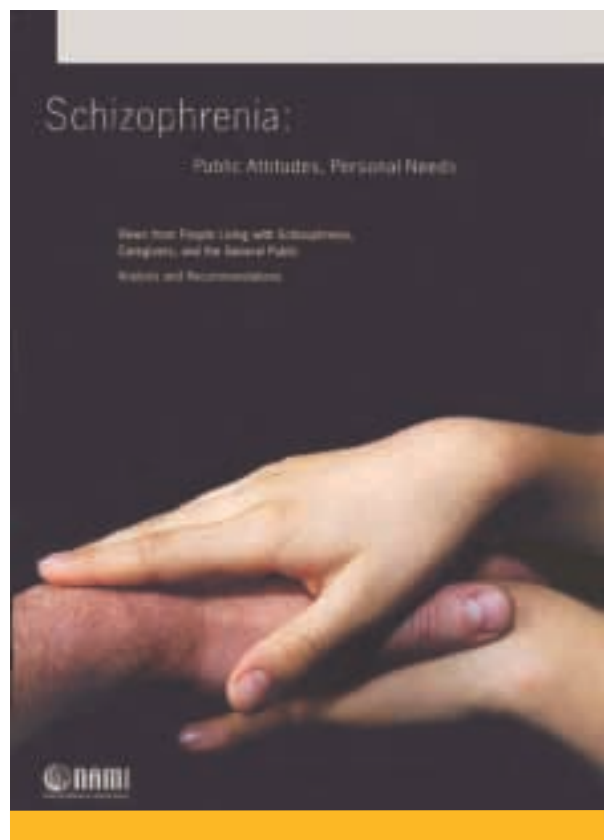
### August 2008:

NAMI launched the *Grading the States* survey in preparation for its 2009 report.

### September 2008:

The U.S. House of Representatives passed two bills: one to expand supportive housing and another to restore protections under the Americans with Disabilities Act (ADA) due in large part to NAMI's advocacy efforts. President Bush signed both into law.

NAMI established a special fund to provide relief to individuals and families affected by serious mental illness in Louisiana and Texas devastated by Hurricanes Gustav and Ike.







#### **October 2008:**

Victory! On Oct. 3, 2008, the U.S. Congress passes mental health insurance parity, a major victory after a 20 year NAMI advocacy campaign. The bill was quickly signed by President Bush.

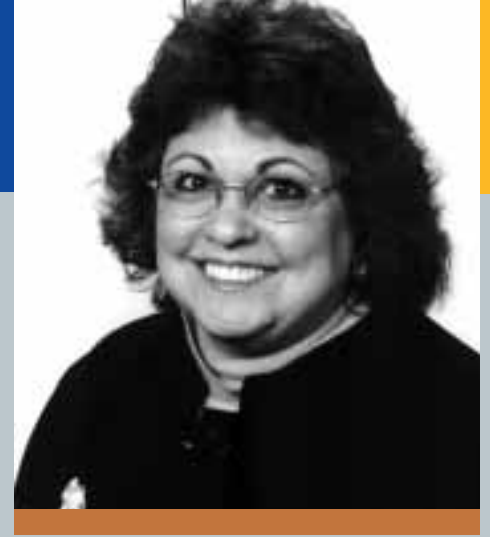
NAMI celebrated Mental Illness Awareness Week (MIAW), themed “Building Community, Taking Action,” through the promotion of various activities including faith outreach, mood disorder screening events, community forums and more. MIAW is held the first week of October each year. In recognition of MIAW 2008, Dr. Gariane Gunter, a psychiatrist in South Carolina, who was crowned Mrs. United States, dedicated her reign to raising public awareness about mental illness.

#### **November 2008:**

NAMI publishes a new brochure to coincide with Veteran's Day, *Understanding Posttraumatic Stress Disorder and Recovery*.

#### **December 2008:**

NAMI surpassed the \$30 million mark in local fundraising efforts through the NAMIWalks program. NAMIWalks has managed to support over 400 local affiliates since the program began in 2003.



## *I am NAMI*

**Jane Roennigke**  
**NAMI Madison County, Ill.**

NAMI doesn't solve everything, but it was the anchor that held us firm when we got buffeted by the winds of mental illness. My husband, Rob, and I frequently felt lost and alone while raising our two adopted children, both of whom had early onset severe mental illness. What would our lives have been like without the education and support from NAMI? I shudder to think.

While getting help for our children, I got to know our community mental health center and was asked to become a board member. A fellow board member, who was also a NAMI Family-to-Family teacher, convinced us to take her class. We went out of politeness, figuring we would tell her afterwards that it wasn't for us. Boy, were we wrong! Her insistence that we attend Family-to-Family was truly life-changing. We found others who were just like us—hurting, struggling and doing the best that they could. At the end of the Family-to-Family course, we joined NAMI. Shortly afterward, we were encouraged to attend teacher training for “Visions for Tomorrow” for parents of children with a mental illness. Rob and I discovered our passion: teaching and helping others with their own struggles of raising children with mental illness. NAMI Basics was developed, Illinois was the first state to be trained and Rob and I were the first in the world to teach a NAMI Basics class.

Our NAMI affiliate now collaborates with parents, educators and mental health professionals in a yearly children's mental health conference. Since 2003, “Piecing It All Together” has brought together hundreds of diverse advocates on children's mental health issues. You know the drill: classic grassroots. It's what we do in here in southern Illinois, and it's what NAMI does everywhere.

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\* indicates contributions made in CY 2007, but FY 2008.



**INDEPENDENT AUDITORS' REPORT**

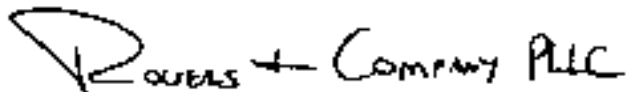
To the Board of Directors of  
NAMI and Affiliate

We have audited the accompanying consolidated statement of financial position of NAMI and Affiliate (collectively "the Organization") as of December 31, 2008, and the related consolidated statements of activities, functional expenses and cash flows for the six months then ended. These consolidated financial statements are the responsibility of the Organization's management. Our responsibility is to express an opinion on these consolidated financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of NAMI and Affiliate at December 31, 2008, and the changes in its net assets and its cash flows for the six months then ended in conformity with accounting principles generally accepted in the United States of America.

Our audit was conducted for the purpose of forming an opinion on the basic consolidated financial statements taken as a whole. The supplemental information included at pages 16-17 is presented for purposes of additional analysis of the basic consolidated financial statements and is not a required part of the basic consolidated financial statements. Such information for the six months ended December 31, 2008 has been subjected to the auditing procedures applied in the audit of the basic consolidated financial statements, and in our opinion, is fairly stated in all material respects in relation to the basic consolidated financial statements taken as a whole.

A handwritten signature in black ink that reads "Rogers & Company PLLC". The signature is stylized, with the "R" being particularly large and the "&" symbol being clearly visible.

Vienna, Virginia  
February 26, 2009

## **NAMI and Affiliate**

### **Consolidated Statement of Financial Position December 31, 2008**

#### **Assets**

|                             |                |
|-----------------------------|----------------|
| Cash and cash equivalents   | \$ 2,233,598   |
| Accounts receivable         | 1,231,440      |
| Inventory                   | 96,090         |
| Investments                 | 6,345,679      |
| Prepaid expenses            | 340,235        |
| Property and equipment, net | <u>345,067</u> |

Total assets \$ 10,592,109

#### **Liabilities and Net Assets**

##### **Liabilities**

|                                       |                |
|---------------------------------------|----------------|
| Accounts payable and accrued expenses | \$ 968,868     |
| Deferred revenue                      | 91,807         |
| Deferred rent and lease incentive     | 174,891        |
| Deposits                              | 14,786         |
| Charitable gift annuities             | <u>224,034</u> |

Total liabilities 1,474,386

##### **Net Assets**

|                        |                |
|------------------------|----------------|
| Unrestricted           | 1,274,372      |
| Temporarily restricted | 7,310,438      |
| Permanently restricted | <u>532,913</u> |

Total net assets 9,117,723

Total liabilities and net assets \$ 10,592,109

## NAMI and Affiliate

### Consolidated Statement of Activities For the Six Months Ended December 31, 2008

|  | Unrestricted               | Temporarily<br>Restricted  | Permanently<br>Restricted | Total                      |
|--|----------------------------|----------------------------|---------------------------|----------------------------|
| <b>Revenue and Support</b>             |                            |                            |                           |                            |
| Contributions                          | \$ 1,973,055               | \$ 6,074,500               | \$ 6,900                  | \$ 8,054,455               |
| Walks                                  | 438,269                    | -                          | -                         | 438,269                    |
| Registrations                          | 10,431                     | -                          | -                         | 10,431                     |
| Investment loss                        | (1,418,232)                | -                          | -                         | (1,418,232)                |
| Contracts                              | 160,693                    | -                          | -                         | 160,693                    |
| Dues                                   | 127,065                    | -                          | -                         | 127,065                    |
| Sales                                  | 145,276                    | -                          | -                         | 145,276                    |
| Other revenue                          | 117,928                    | -                          | -                         | 117,928                    |
| Net assets released from restrictions: |                            |                            |                           |                            |
| Satisfaction of program restrictions   | 1,222,500                  | (1,222,500)                | -                         | -                          |
| Satisfaction of time restrictions      | 2,287,910                  | (2,287,910)                | -                         | -                          |
| <b>Total revenue and support</b>       | <u>5,064,895</u>           | <u>2,564,090</u>           | <u>6,900</u>              | <u>7,635,885</u>           |
| <b>Expenses</b>                        |                            |                            |                           |                            |
| Program services:                      |                            |                            |                           |                            |
| Program and membership support         | 1,850,884                  | -                          | -                         | 1,850,884                  |
| Education services                     | 1,459,788                  | -                          | -                         | 1,459,788                  |
| Advocacy                               | 867,022                    | -                          | -                         | 867,022                    |
| <b>Total program services</b>          | <u>4,177,694</u>           | <u>-</u>                   | <u>-</u>                  | <u>4,177,694</u>           |
| Supporting services:                   |                            |                            |                           |                            |
| Administration                         | 654,247                    | -                          | -                         | 654,247                    |
| Development                            | 974,443                    | -                          | -                         | 974,443                    |
| <b>Total supporting services</b>       | <u>1,628,690</u>           | <u>-</u>                   | <u>-</u>                  | <u>1,628,690</u>           |
| <b>Total expenses</b>                  | <u>5,806,384</u>           | <u>-</u>                   | <u>-</u>                  | <u>5,806,384</u>           |
| <b>Change in Net Assets</b>            | (741,489)                  | 2,564,090                  | 6,900                     | 1,829,501                  |
| <b>Net Assets, beginning of period</b> | <u>2,015,861</u>           | <u>4,746,348</u>           | <u>526,013</u>            | <u>7,288,222</u>           |
| <b>Net Assets, end of period</b>       | <u><u>\$ 1,274,372</u></u> | <u><u>\$ 7,310,438</u></u> | <u><u>\$ 532,913</u></u>  | <u><u>\$ 9,117,723</u></u> |



## NAMI and Affiliate

### Consolidated Statement of Cash Flows For the Six Months Ended December 31, 2008

#### Cash Flows from Operating Activities

|   |              |
|---|--------------|
| Change in net assets  | \$ 1,829,501 |
| Adjustments to reconcile change in net assets to net cash used in operating activities: |              |
| Net realized loss on sales of investments   | 760,333      |
| Unrealized loss on investments  | 749,745      |
| Donated investments   | (24,621)     |
| Contributions restricted for long-term purposes   | (6,900)      |
| Change in value of split-interest agreements  | (19,952)     |
| Depreciation and amortization   | 85,035       |
| Change in operating assets and liabilities:   |              |
| Increase in accounts receivable   | (102,574)    |
| Increase in inventory   | (22,159)     |
| Increase in prepaid expenses  | (139,425)    |
| Decrease in accounts payable and accrued expenses                                       | (231,891)    |
| Decrease in deferred revenue  | (32,948)     |
| Decrease in deferred rent and lease incentive   | (76,214)     |

Net cash provided by operating activities 2,767,930

#### Cash Flows from Investing Activities

|                                     |             |
|-------------------------------------|-------------|
| Proceeds from sales of investments  | 1,946,171   |
| Purchases of investments            | (4,006,894) |
| Purchases of property and equipment | (64,439)    |

Net cash used in investing activities (2,125,162)

#### Cash Flows from Financing Activities

|   |          |
|---|----------|
| Payments on charitable gift annuity obligations | (14,821) |
| Contributions restricted for long-term purposes | 6,900    |

Net cash used in financing activities (7,921)

**Net Increase in Cash and Cash Equivalents** 634,847

**Cash and Cash Equivalents, beginning of period** 1,598,751

**Cash and Cash Equivalents, end of period** \$ 2,233,598

#### Supplemental Cash Flow Disclosures

|               |                         |
|---------------|-------------------------|
| Donated stock | <u><u>\$ 24,621</u></u> |
|---------------|-------------------------|



## INDEPENDENT AUDITOR'S REPORT

To the Board of Directors of  
NAMI and Mind of America Foundation

CONSULTING  
ACCOUNTING  
TECHNOLOGY

Certified Public  
Accountants

We have audited the accompanying consolidated statement of financial position of NAMI and Affiliate (collectively referred to as the Organization) as of June 30, 2008, and the related consolidated statements of activities, functional expenses and cash flows for the year then ended. These financial statements are the responsibility of the Organization's management. Our responsibility is to express an opinion on these financial statements based on our audit. The prior year summarized comparative information has been derived from the Organization's 2007 consolidated financial statements and in our report dated September 13, 2007, we expressed an unqualified opinion on those financial statements

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement. An audit includes consideration of internal controls over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over financial reporting. Accordingly, we express no opinion. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the consolidated financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of the Organization as of June 30, 2008, and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Our audit was conducted for the purpose of forming an opinion on the basic consolidated financial statements taken as a whole. The accompanying consolidating information as of and for the year ended June 30, 2008 on pages 14 and 15 is presented for purposes of additional analysis and is not a required part of the basic consolidated financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic consolidated financial statements and, in our opinion, is fairly stated in relation to the basic consolidated financial statements taken as a whole.

  
RAFFA, P.C.

Washington, D.C.  
October 15, 2008

**NAMI AND AFFILIATE****CONSOLIDATED STATEMENT OF FINANCIAL POSITION****June 30, 2008****(With Summarized Financial Information as of June 30, 2007)**

|   | <u>2008</u>                | <u>2007</u>                |
|---|----------------------------|----------------------------|
| <b>ASSETS</b>                           |                            |                            |
| Cash and cash equivalents               | \$ 1,598,751               | \$ 2,326,367               |
| Investments                             | 5,770,413                  | 5,960,716                  |
| Accounts receivable                     | 1,128,866                  | 251,891                    |
| Inventory                               | 73,931                     | 80,310                     |
| Prepaid expenses                        | 200,810                    | 201,776                    |
| Property and equipment, net             | <u>365,663</u>             | <u>419,943</u>             |
| <b>TOTAL ASSETS</b>                     | <u><u>\$ 9,138,434</u></u> | <u><u>\$ 9,241,003</u></u> |
| <b>LIABILITIES AND NET ASSETS</b>       |                            |                            |
| <b>Liabilities</b>                      |                            |                            |
| Accounts payable and accrued expenses   | \$ 1,340,300               | \$ 1,926,963               |
| Deferred rent and lease incentive       | 251,105                    | 392,655                    |
| Charitable gift annuities payable       | <u>258,807</u>             | <u>219,147</u>             |
| <b>TOTAL LIABILITIES</b>                | <u>1,850,212</u>           | <u>2,538,765</u>           |
| <b>Net assets</b>                       |                            |                            |
| Unrestricted                            | 2,015,861                  | 1,778,757                  |
| Temporarily restricted                  | 4,746,348                  | 4,398,293                  |
| Permanently restricted                  | <u>526,013</u>             | <u>525,188</u>             |
| <b>TOTAL NET ASSETS</b>                 | <u>7,288,222</u>           | <u>6,702,238</u>           |
| <b>TOTAL LIABILITIES AND NET ASSETS</b> | <u><u>\$ 9,138,434</u></u> | <u><u>\$ 9,241,003</u></u> |



**NAMI AND AFFILIATE**  
**CONSOLIDATED STATEMENT OF ACTIVITIES**  
For the Year Ended June 30, 2008  
(With Summarized Financial Information for the Year Ended June 30, 2007)

|  | Unrestricted        | Temporarily<br>Restricted | Permanently<br>Restricted | 2008<br>Total       | 2007<br>Total       |
|--|---------------------|---------------------------|---------------------------|---------------------|---------------------|
| <b>REVENUE AND SUPPORT</b>             |                     |                           |                           |                     |                     |
| Contributions                          | \$ 2,850,855        | \$ 7,676,225              | \$ 825                    | \$ 10,527,905       | \$ 10,207,160       |
| Walks                                  | 894,201             | -                         | -                         | 894,201             | 659,237             |
| Registration                           | 940,505             | -                         | -                         | 940,505             | 460,358             |
| Investment (loss) income               | (429,594)           | -                         | -                         | (429,594)           | 433,671             |
| Contracts and grants                   | 555,030             | -                         | -                         | 555,030             | 411,789             |
| Dues                                   | 369,685             | -                         | -                         | 369,685             | 388,154             |
| Sales                                  | 252,943             | -                         | -                         | 252,943             | 278,882             |
| Other revenue                          | 174,381             | -                         | -                         | 174,381             | 257,438             |
| Combined federal campaign              | 97,133              | -                         | -                         | 97,133              | 88,775              |
| Net assets released from restrictions: |                     |                           |                           |                     |                     |
| Satisfaction of program restrictions   | 4,623,170           | (4,623,170)               | -                         | -                   | -                   |
| Satisfaction of time restrictions      | 2,705,000           | (2,705,000)               | -                         | -                   | -                   |
| <b>TOTAL REVENUE AND SUPPORT</b>       | <b>13,033,309</b>   | <b>348,055</b>            | <b>825</b>                | <b>13,382,189</b>   | <b>13,185,464</b>   |
| <b>EXPENSES</b>                        |                     |                           |                           |                     |                     |
| Program Services                       |                     |                           |                           |                     |                     |
| Program and membership support         | 4,355,642           | -                         | -                         | 4,355,642           | 5,211,276           |
| Education services                     | 3,275,957           | -                         | -                         | 3,275,957           | 2,051,952           |
| Advocacy                               | 1,858,909           | -                         | -                         | 1,858,909           | 1,794,818           |
| <b>Total Program Services</b>          | <b>9,490,508</b>    | <b>-</b>                  | <b>-</b>                  | <b>9,490,508</b>    | <b>9,058,046</b>    |
| Supporting Services                    |                     |                           |                           |                     |                     |
| Administration                         | 1,785,060           | -                         | -                         | 1,785,060           | 1,674,627           |
| Development                            | 1,520,637           | -                         | -                         | 1,520,637           | 1,669,505           |
| <b>Total Supporting Services</b>       | <b>3,305,697</b>    | <b>-</b>                  | <b>-</b>                  | <b>3,305,697</b>    | <b>3,344,132</b>    |
| <b>TOTAL EXPENSES</b>                  | <b>12,796,205</b>   | <b>-</b>                  | <b>-</b>                  | <b>12,796,205</b>   | <b>12,402,178</b>   |
| <b>Change in Net Assets</b>            | <b>237,104</b>      | <b>348,055</b>            | <b>825</b>                | <b>585,984</b>      | <b>783,286</b>      |
| <b>NET ASSETS, BEGINNING OF YEAR</b>   | <b>1,778,757</b>    | <b>4,398,293</b>          | <b>525,188</b>            | <b>6,702,238</b>    | <b>5,918,952</b>    |
| <b>NET ASSETS, END OF YEAR</b>         | <b>\$ 2,015,861</b> | <b>\$ 4,746,348</b>       | <b>\$ 526,013</b>         | <b>\$ 7,288,222</b> | <b>\$ 6,702,238</b> |

**NAMI AND AFFILIATE**  
**CONSOLIDATED STATEMENT OF CASH FLOWS**  
For the Year Ended June 30, 2008  
(With Summarized Financial Information for the Year Ended June 30, 2007)  
Increase (Decrease) in Cash and Cash Equivalents

|   | 2008                | 2007                |
|---|---------------------|---------------------|
| <b>CASH FLOWS FROM OPERATING ACTIVITIES</b>   |                     |                     |
| Change in net assets  | \$ 585,984          | \$ 783,286          |
| Adjustments to reconcile change in net assets<br>to net cash (used in) provided by operating activities |                     |                     |
| Net realized loss (gain) on sales of investments  | 230,745             | (249,885)           |
| Unrealized (gain) loss on investments   | 407,239             | 124,516             |
| Donated investments   | (50,024)            | (67,831)            |
| Contributions restricted for long-term purposes   | (825)               | (28,401)            |
| Loss on disposal of assets  | -                   | 19,613              |
| Depreciation and amortization   | 145,961             | 170,420             |
| Changes in assets and liabilities:  |                     |                     |
| Accounts receivable   | (876,973)           | (20,184)            |
| Inventory   | 6,378               | (29,042)            |
| Prepaid expenses  | 966                 | (59,487)            |
| Accounts payable and accrued expenses   | (586,663)           | 821,797             |
| Deferred rent and lease incentive   | (141,550)           | (120,066)           |
| <b>NET CASH (USED IN) PROVIDED BY OPERATING ACTIVITIES</b>  | <u>(278,762)</u>    | <u>1,344,736</u>    |
| <b>CASH FLOWS FROM INVESTING ACTIVITIES</b>   |                     |                     |
| Proceeds from sales of investments  | 8,285,258           | 2,400,096           |
| Purchases of investments  | (8,682,917)         | (5,900,801)         |
| Purchases of property and equipment   | (91,680)            | (142,957)           |
| <b>NET CASH USED IN INVESTING ACTIVITIES</b>  | <u>(489,339)</u>    | <u>(3,643,662)</u>  |
| <b>CASH FLOWS FROM FINANCING ACTIVITIES</b>   |                     |                     |
| Payments on charitable gift annuity obligations   | (30,141)            | (27,987)            |
| Proceeds from charitable gift annuities   | 69,801              | 14,314              |
| Contributions restricted for long-term purposes   | 825                 | 28,401              |
| <b>NET CASH PROVIDED BY FINANCING ACTIVITIES</b>  | <u>40,485</u>       | <u>14,728</u>       |
| <b>NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS</b>   | <u>(727,616)</u>    | <u>(2,284,198)</u>  |
| <b>CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR</b>   | <u>2,326,367</u>    | <u>4,610,565</u>    |
| <b>CASH AND CASH EQUIVALENTS, END OF YEAR</b>   | <u>\$ 1,598,751</u> | <u>\$ 2,326,367</u> |
| <b>NONCASH INVESTING ACTIVITIES</b>   |                     |                     |
| Donated stock   | <u>\$ (50,024)</u>  | <u>\$ (67,831)</u>  |



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