

Leading Into the Future for

CHANGE



Leading into the Future for



CHANGE

The ecosystem of mental health and substance use care is ever-changing. Our organization offers steady leadership and forward-thinking progress to ensure mental health as essential health.



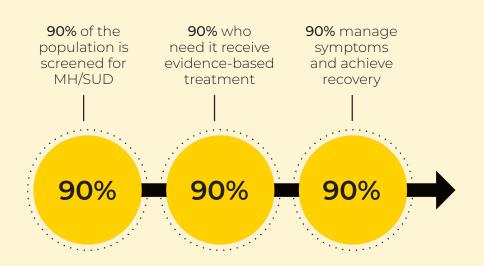


Advance policy.

Affect systems change.

90-90-90

Through Alignment for Progress, we will reach the 90-90-90 goals:



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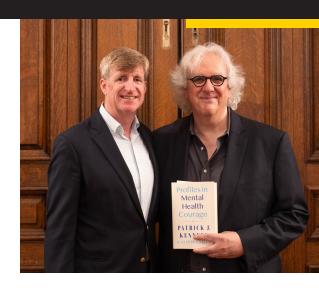
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Raising the Visibility of **MENTAL HEALTH in** 2024

The Kennedy Forum Elevates Key Issues Nationwide

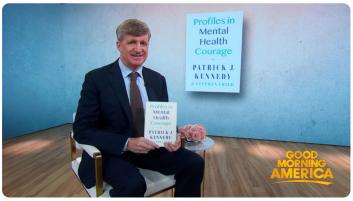
Taking the **Mental Health Movement** to Millions

From CBS Saturday Morning to Good Morning America and People Magazine, The Kennedy Forum helps more people get to know the facts and the faces of mental health and substance use progress in the U.S., including through the groundbreaking book "Profiles in Mental Health Courage," co-written by Patrick J. Kennedy.





Patrick J. Kennedy joined Stephen Fried to discuss their book "Profiles in Mental Health Courage" with reporter Michelle Miller



Good Morning America (GMA3) featured the book showing real stories of mental health.



Amy L. Kennedy spoke with People Magazine to discuss her work in youth mental health.

Convening Big Names to Advance Solutions

The 2024 Alignment for Progress conference brought together a robust who's-who of national leaders, including 11 members of the CEO Alliance for Mental Health who announced a unanimous endorsement of the 90-90-90 goals.



Pictured left, counterclockwise: Dr. Kathleen Pike, Chief Executive Officer, One Mind at Work; Lisa Dailey, Executive Director, Treatment Advocacy Center; Robert Gebbia, CEO, American Foundation for Suicide Prevention; Rebecca O. Bagley, President & CEO of The Kennedy Forum; Dan Gillison, Chief Executive Officer, NAMI; Rick Kellar, President & CEO, Peg's Foundation; Karen Larsen, CEO, Steinberg Institute; Shawn Coughlin, CEO, National Association for Behavioral Health; Schroeder Stribling, President & CEO, Mental Health America; Dr. Anthony Estreet, Chief Executive Officer, National Association of Social Workers; Moderator not pictured: Tyler Norris, Co-Founder and Director, CEO Alliance for Mental Health

Moving Parity into The Public Eye for the Win

As part of our decades-long efforts to enhance Parity, Patrick J. Kennedy publicly called for enhanced enforcement of the Parity law in April, just months before the White House Administration announced a final rule which mirrored much of our input. This successful yearlong campaign ended with our biggest win yet: The Final Parity Rule Announcement!



Patrick J. Kennedy is flanked by supporters and "Profiles in Mental Health Courage" profilees in front of Times Square billboards, donated by New Traditions, Inc. to help raise visibility for those who are denied coverage for MH/SUD.



At the Times Square Event, we unveiled four billboards that illuminated one important truth about our work in parity: Mental health is essential health.

n p r **Forbes** PI PROPUBLICA



The Kennedy Forum Chief Policy Officer Nathaniel Z. Counts, JD speaks to a group of mental health experts at an in-person meeting of the Data Committee.

Leading Substantive **Policy Conversation**

Our leaders drive what's next in mental health and substance use disorder advancements through original research, and analysis, thought leadership, and opinions that are featured in Forbes, NPR, ProPublica, CalMatters, Broadcast Retirement News, and Semafor; in addition to peer-reviewed journals like Lancet Psychiatry and nature.com. Our experts have also served as policy contributors for the Bipartisan Policy Center, The California Health Care Foundation, The Ruderman Family Foundation, and Inseparable.

VEWS

Letter from Patrick J. Kennedy and Amy L. Kennedy

Times of change are always propulsive — for organizations and for movements. It is our fundamental objective to ensure that the trajectory of evidence-based, accessible mental health and substance use disorder (MH/SUD) care remains carefully, collaboratively guided.

That was the reason that we announced the 90-90-90 goals. That vision provides us a north star that never waivers — even amid tectonic societal shifts — and offers a common sight for all who care about people with MH/SUD.

As you'll see throughout, we pursued novel solutions and gained meaningful ground this year — and every single step follows a measurable plan for the future. We can keep this momentum together to realize a future for change.

Patrick J. Kennedy

Amy L. Kennedy

Petrick F Kamel

any of Kennedy





Letter from Rebecca O. Bagley

The success of a movement relies on the strength of its foundation, the resilience of its momentum, and the steadfastness of its partners.

By all measures, this year proved that our movement is strong. We pushed policy wins in our laboratory states and at the national level, including a decisive win for federal mental health Parity through a strong final rule. We leveraged partners who helped us find novel ways to measure our path to the 90s, develop powerful recommendations for youth mental health, and solve critical issues in MH/SUD data and workforce development. We witnessed important, powerful stories of MH/SUD portrayed in Patrick's release of "Profiles in Mental Health Courage." And, we felt the visible signs of progress and hopefulness at the 2024 Alignment for Progress conference. To see so many of our partners in one place talking about the same outcomes was spectacular.

Despite the complex times we live in, I see great opportunity in 2025, because those who galvanize and align for change are vitally important — and this year showed that's what we do best at The Kennedy Forum.

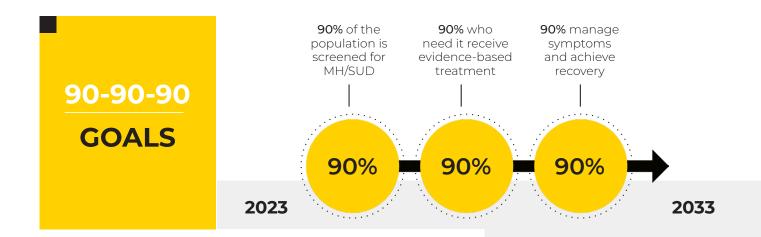
Rebecca O. Bagley





Key Research, **Tools and Resources**

Measuring Our Progress to the 90-90-90 Goals



Through our partnerships, we are equipped to analyze progress and chart a path toward our north star 90-90-90 goals through better data and clear policy directives.

Together with McKinsey Mental Health Institute, we projected our National Strategy recommendations through a 10-year course for success. Looking ahead, we will outline roles for key pieces of the movement to achieve it.

In partnership with KPMG, we developed snapshots of our five-year outlook in screening, treatment, and recovery. These pictures are derived from medical claims data, national mental health surveys, and public data, and help us see where we are — and where we need to go. See the numbers for yourself!

300 million

data points were analyzed by industry experts to show fiveyear snapshots in screening, treatment, and recovery.

Working Toward **Solutions** for Today's Biggest Issues

The mental health and substance use disorder system in the U.S. can only be realized if we address long-standing barriers that stand in the way of change. The Kennedy Forum identifies key issues and works with renowned experts representing the public and private sectors to examine and offer solutions that can help millions of Americans receive better care.

Leaders who are engaged in our 2024 committees

touch 50% of Americans

who are covered by commercial insurance.

Structural Issues

Data and Transparency in Mental Health



Experts Convened

Data Committee and Quality/ **Outcomes Subcommittee**



Purpose

To assess how our current data ecosystem can be improved to ensure patients are counted and providers are paid fairly.



Results

Our team of experts released Moving the Needle on Mental Health Outcomes and a measurement framework to drive continuous improvement that they applied to bipolar disorder and opioid use disorder.

Behaviorial Health Care Workforce Shortage



Experts Convened

Workforce Committee



Purpose

To create a consensus on approaches to curb the mental health professional shortage and meet the needs of the tens of millions of Americans who seek care each year.



Results

The committee published **Building** the Mental Health and Substance **Use Disorder Workforce We Need** in addition to the interactive Career Pathways Map, featured on the Workforce Solutions Jam webinar.

Providing Key Interventions for Youth Mental Health

PROGRESS

KENNEDY FORUM



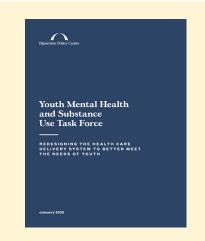


TKF collaborated with more than 50 organizations to release a suite of youth mental health resources focused on solving urgent and complex youth mental health needs, including:

- Sustainable financing for quality services in public schools
- Better responses to emerging issues in youth mental health and addiction
- Recommendations for state leaders and high-level decisionmakers, created in partnership with the School-Based Mental Health Industry Council (See full list in acknowledgments)

Additionally, Co-Founder Amy L. Kennedy contributed to a new report published by the Bipartisan Policy Center that helps deliver a road map to better care, so youth and their families can find help when, where, and how they need it.

Advocating for Substance Use Disorder Care In just one quarter, there were almost 1,000 downloads of TKF resources for use by advocates, partners, and decision-makers.



With a generous grant from the Elevance Health Foundation, we supported Mobilize Recovery's 13-state bus-tour offering evidence-based prevention and recovery strategies, and crisis support resources. Funding from Elevance also facilitated Mobilize Recovery's creation of the GET HELP **App** that helps individuals find appropriate substance use care.

Convenings

2024 Alignment for Progress

"The Alignment for Progress has been one of the most inspiring events that I've participated in . . . every one of the panels is communicating the real commitment to the 90-90-90 goals and it is beginning to look like what we want the industry to look like — which is private/public sector partnership and alignment."

- Malekeh Amini, Founder & CEO, Trayt. Health

Held in Washington, D.C., an enthusiastic crowd of more than 400 people gathered from different industries, geographies, and ideals, and united under one vision: To reach the 90-90-90 goals. Audience members and speakers at the conference included White House Administration, state officials, elected officials, providers, payors, politicians, advocates, nonprofit leaders, and those with lived experience. This event moves forward mental health:

- **2023** TKF announces the Alignment for Progress (A4P) movement and provides the framework for change
- 2024 A4P engages with elected officials and rolls out measurement tools
- **2025** The movement defines discrete roles for different industries and leaders to meet 90-90-90

85%

of attendee respondents agreed or strongly agreed that Alignment for Progress fills a gap in the mental health/substance use disorder space.





RESPONDING TO EMERGING YOUTH MENTAL HEALTH ISSUES

In March, The Youth Mental Health & Addiction Workshop, cohosted by The Kennedy Forum, McKinsey Health Institute, and the Morgan Stanley Children's Mental Health Initiative, gathered 45+ of the nation's leading organizations who deal with youth mental health issues to explore better ways to address the distinct issues facing our young people and get ahead of potential problems by offering proactive solutions.

ENGAGING PHILANTHROPY

In early 2024, The Kennedy Forum and the McKinsey Health Institute, McKinsey Brain Health Center of Excellence, and McKinsey Philanthropy Practice gathered experts across sectors for the Philanthropy Roundtable on Mental Health, to discuss the most pressing issues that organizations can advance to help reach 90-90-90 by 2033.

ALIGNING FOR PROGRESS ON THE CAPE 2024

Alignment for Progress sponsors were invited to the Kennedy Compound in early June in advance of the annual conference, to share in the excitement of the progress we've made and the promise of what is to come. We shared our sincerest appreciation for their continued commitment to crucial mental health leadership amid the beautiful backdrop of the Cape.



Supporters of The Kennedy Forum gathered on Cape Cod as we celebrated their commitment in helping advance the 90-90-90 by 2033 goals.

Major Policy Initiatives and Wins

Advancing and Defending **Federal Parity**

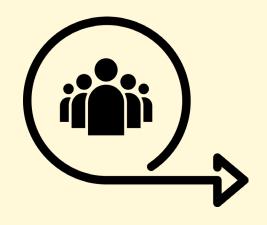
The Biden Administration announced a momentous rule to enhance enforcement of the 2008 Mental Health Parity and Addiction Equity Act (MHPAEA), co-authored by Patrick J. Kennedy. Our organization has continued active advocacy for these improvements, building on more than a decade of work on mental health parity progress at the state and national levels. We have always, and will always, work toward equitable, insurance-covered mental health and substance use disorder care in the U.S.

The Kennedy
Forum continues
to advance model
parity legislation,
which is already
partially or wholly
in place in 22
states across
the U.S.



The Kennedy Forum was invited to an announcement including representatives from The Department of Labor and mental health leaders, including Co-Founder Patrick J. Kennedy and President & CEO Rebecca O. Bagley, pictured here with the U.S. Department of Labor staff, including then Assistant Secretary Lisa M. Gomez.

Other **Key Federal Parity Policy Moves** Include:



Medicaid Parity Compliance

TKF engaged in efforts to support CMS and state regulators in ensuring state Medicaid agencies and Medicaid Managed Care plans are working towards ensuring parity compliance, including leading 70+ organizations to submit tangible actions CMS can take.

Funding for Strong Enforcement

Our policy leaders led the submission of key letters to the White House for parity funding, supported by more than 35 organizations.

Guiding Adoption of State Parity Gold **Standards**

The Kennedy Forum relaunched its State Parity WorkGroup, a monthly meeting drawing more than 250 state and federal representatives of advocacy organizations and state government agencies, to receive guidance on key elements of parity implementation. In 2025, The Kennedy Forum will codify these guidelines into State Parity Gold Standards that can be accessed nationwide.



Driving Key Wins inLaboratory States

California

Changing the Course on Parity Non-Compliance

After an extensive records-request campaign, The Kennedy Forum evaluated and uncovered regulator records of widespread noncompliance, an action that is likely to result in further public accountability measures and oversight capabilities.

Leading 988 and Parity Coalitions

As a result of a three-year effort leading a state parity coalition of consumers, providers, and other MH/SUD advocates, the state's largest regulator, the Department of Managed Health Care, issued final regulations on our parity bill, SB 855, reflecting much of our recommendations for implementation. TKF also led this same coalition in a letter urging the California Department of Insurance to adopt its comprehensive parity and 988 regulations.

The state's largest regulator also issued unprecedented plan guidance for effective billing and reimbursement for emergency services, which were mandated under TKF's parity and 988 bills.



The Kennedy Forum is the only organization in the U.S. with a 10-year history of foundational parity work in Illinois and California.

Illinois

Groundbreaking Statewide Tools

In 2024, we obtained funding from the state of Illinois to complete research and later launch a game-changing tool alongside founding strategic partners Third Horizon Strategies and the American Medical Association to track and publish down-to-the-county data points on mental health parity and stigma.

The Healthcare Protection Act

Governor Pritzker of Illinois signed the Healthcare Protection Act into law! The Kennedy Forum has provided years-long advocacy for this seminal model legislation.

Enhanced Community Care

Illinois celebrated the expansion of Certified Community Behavioral Health Clinics (CCBHCs), a key tenet of our **National Strategy recommendations** and in our decade of work in Illinois.



LOOKING AHEAD



In 2025, The Kennedy Forum will launch the Mental Health Parity Index to demonstrate real-time data on key parity issues.

State of Mental Health

MENTAL HEALTH AND **SUBSTANCE USE IN THE U.S.**

- 60 million Americans experienced a mental illness in 2024, and 45 million people had a substance use disorder. 1
- Deaths due to substance use quadrupled between 2002 and 2022. ²



FACING OUR YOUTH

- 20% of youth experienced a major depressive issue in 2024 and 13.6% of youth had serious thoughts of suicide in the past year.⁵
- Pediatric mental health was associated with \$59 billion in household spending. 6
- Only 56% of schools feel that they can provide sufficient mental health services for students. 7

IN THE WORKPLACE

- Only 51% of Americans are thriving — a record low. Thriving people miss 53% fewer days at work and are 32% less likely to be job hunting. 3
- Lost productivity due to mental health is estimated to cost \$47.6 billion annually. 4

51%

\$47.6

PARITY

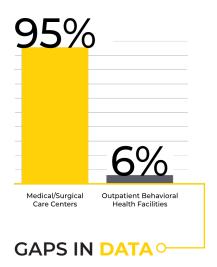
CHALLENGES

- In a survey of state insurance agencies, responses showed that between 2018 and 2023, there were only 45 parity enforcement actions taken against insurance companies nationwide.8
- An algorithm decides the mental health care fates for more than 100 million Americans. 9
- Patients went out-of-network 3.5x more often to see a mental health professional vs. a medical/surgical clinician. 10



WORKFORCE SHORTAGES

- More than 122 million Americans live in "mental health deserts" where providers are in short supply.
- Projections through 2036 show significant shortages of counselors, psychologists, therapists, and psychiatrists.



Electronic health records exist for 95% of medical/ surgical care centers, but only 6% for outpatient behavioral health facilities. ¹³

7MILLION 200 + REGULATORS 50 MILLION 87%

PARITY PROGRESS AND GUIDANCE

- 7 million Americans across
 72,000 plans have benefited
 from enforcement of the
 Final Parity Rule since 2021.
- 200+ state regulators receive monthly guidance through State Parity Workgroup
- 50 million residents of California and Illinois benefit from parity progress
- 87% of the comments for the Parity Final Rule mirrored our language

Alignment for Progress

Helping Us Reach the 90-90-90 Goals:

190



190+ partners 15



15 CEOs of major health organizations

235



235 searchable national policy recommendations

How We Work





Parity Implementation

Offers national leadership and state laboratory support

Aligning Financial Incentives

Allows scale by optimizing payment models

National Strategy Recommendations

Drives better federal policy



Movement **Building**

Alignment for Progress

Convenes and galvanizes partners to reach 90-90-90 by 2033

Convenings

Gather top minds to solve timely issues

Thought Leadership To drive ideas

How We Work

Vision: To ensure mental health as essential health

Mission: Align stakeholders to advance policy and goals to affect and assess system change.



Youth **Mental Health**

Research

Informs advocates, school, and government leaders

School-Based Industry Council

Leads insights and conversation

Access to Care

Ensures policy get youth the services they need.



Structural Solutions

Economic Modeling

Helps fund mental health effectively

Data Harnessing

Offers numbers and transparency to chart change

Life-Course Mental Health

Examines core mental health needs at every age



By the Month

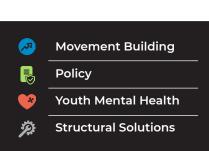
Additional Highlights in 2024

Day in and day out, we are creating change. These are just a few more achievements and important moments that helped us achieve parity wins and make significant advancements to reach the 90-90-90 goals.









January



- TKF furthers the 90-90-90 goals at a workshop with McKinsey Health Institute at the JP Morgan Health Care Conference
- ── In front of an audience of millions, Patrick discusses the urgent mental health crisis on Meet the Press
- TKF leaders and Illinois officials align on parity strategy, setting the stage for future new tools and model legislation

February



- Patrick and Rebecca share National Strategy
 Recommendations on the Hill to aid legislators
- In a push for the Final Parity Rule, Patrick and Rebecca meet with the White House, including key members of the Employee Benefits Security Administration
- O TKF co-hosts the The Alexandria Summit on Mental Health, with a special focus on mental health solutions for veterans
- Rebecca deepens connections with national leaders at the Lake Nona Impact Forum



March



At the Chicago St. Patrick's Day Parade, Patrick was invited as the guest of honor while Peter O'Brien served as Grand Marshall, with tens of thousands of participants exposed to the TKF-centric theme: "Mental Health Is Essential."

April

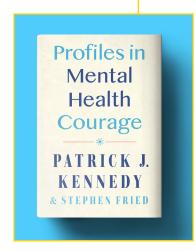


- "Profiles in Mental Health Courage" officially published
- O TKF testifies at the CA legislature in support of a bill for qualified reviewers
- In response to crisis, TKF hosts the Youth Mental Health & Addiction Workshop with McKinsey Health Institute and the Morgan Stanley Children's Mental Health Initiative
- Rebecca represents TKF at the CEO Alliance for Mental Health gathering in Napa, CA, alongside leaders of 15 top MH organizations serving tens of millions in the U.S.
- The data committee meets in person to align and advance key recommendations that are widely disseminated

May



- O TKF led a CEO Alliance letter to tri-agencies supporting the Final Parity Rule and requesting some key changes to strengthen it
- TKF takes "Don't Deny Me" Campaign to Times
 Square in NYC





Movement Building



Policy



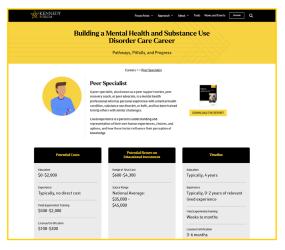
Youth Mental Health



Structural Solutions









Movement Building Policy Youth Mental Health Structural Solutions

- The "Profiles in Mental Health Courage" tour kicks off with a potential audience reach in the hundreds of millions; featured in C-SPAN, GMA3, ABC News, PBS NewsHour, NBC, CBS Saturday, Politico, The New York Times, Time, and The Advocate, and is featured at dozens of conferences and in podcasts nationwide 🔼
- O In California, new draft regulations are released for TKF parity and emergency mental health bills, AB 988 and SB 855 👢

June



- TKFspearheads an MHLG coalition letter supporting \$40 million for EBSA to review health plans' parity compliance analyses 👢
- O Patrick reaches audiences of thousands at events like NAMICON 24, and as a keynote at the American Foundation for Suicide Prevention's 2024 Advocacy Forum 🔼
- Rebecca leads a panel about how to diminish stigma's harmful effects systemically 🔅
- The workforce committee creates pathways for change, resulting in a groundbreaking workforce pathway map and policy brief 🥬

July



- The U.S. Department of Labor submits its final rule to enhance enforcement of the Mental Health Parity and Addiction Equity Act 👢
- O The Parity Final Rule draws 9,503 comments nearly 90% of which mirror TKF language 👢





August



- O Leaders from TKF engage in conversations with the Administration to ensure the Parity Final Rule movies gets over the goal line 👢
- Patrick joins APA CEO, Arthur C. Evans, Justin Maffett, journalist Stephen Fried, and Nicholas St. Fleur at APA's national convention 🔊
- O We released the report "Building Sustainable School-Based Services" to answer a key issue: Only 56% of public schools reported they can provide effective MH services.

September



- The Parity Final Rule is released!
- O Alignment for Progress Conference 2024 draws 400+ leaders from every field 🧀
- O Numerous members of the tri-agencies speak at The Alignment for Progress event 📙
- O A host of **new research and tools** is released to measure and reach 90-90-90 by 2033, including a suite of youth mental health research, workforce and data guidance, and measurement tools 👢 💖 🙉 🌼
- TKF partner Mobilize Recovery launches a bus tour with 4,400 attendees, including an event with TKF
- O We released the report "State Recommendations" for Youth and Mental Health" for state leaders and legislators.

Movement Building



Policy



Youth Mental Health







PROGRESS **Building the** Mental Health and Substance Use Disorder **Workforce We Need** KENNEDY FORUM

October



- TKF's Chief Policy Officer's analysis of the new Parity rule is read by thousands
- The State Mental Health Parity Workgroup relaunches with 250+ registrants
- O TKF led a letter on behalf of 34 organizations urging the inclusion of \$15 million in EBSA DOL funding to review health plans' parity compliance analyses
- O We released a new policy brief: "Building Better Responses to Youth Mental Health and Addiction" to get ahead of emerging issues facing millions of young people. 💖

November



Our new report "Building the Mental Health and Substance Use Disorder Workforce We Need" is featured at the Workforce Solutions Jam 🦃

December



O The School Based Industry Council was invited to share its seminal research findings at the highly regarded National Center for School Mental Health Annual Conference Youth Mental Health



Structural Solutions



Acknowledgments

BUILDER



KPMG

CHAMPION



Bank of America







Providence Well Being





LEADER



Alexandria



Carelon



Dauten Family Foundation



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Mercer



National Association for Behavioral Healthcare

25





Peg's Foundation

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American Foundation for Suicide Prevention



American Psychiatric Association Foundation



Angeon Therapeutics



Brightline





Effective School Solutions



Epic





Masimo



Mental Health America







Redmond Family Care Network





Xerox

CONTRIBUTORS AND PARTNERS

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Providence's Well Being Trust

St. Louis Community Foundation

The San Francisco Foundation

Sozosei Foundation

West Health

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We would also like to acknowledge the School-Based Industry Council Consultant, Shums Alikhan, Senior Strategist, Taylor-Penn Strategies

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