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Introduction to the Standards of Excellence

NAMI's Standards of Excellence define what it means to be an effective organization within our federated model. The standards establish the roles, responsibilities, and minimum requirements for Incorporated Affiliates, State Organizations, and NAMI National. In doing so, they aim to clarify the ways in which all three parts of the Alliance work individually and together in service of our shared vision for impact. The Standards of Excellence also promote accountability and collaboration across Alliance, which helps establish a strong foundation for mutual support, partnership, and collective impact.

Background on NAMI's Standards of Excellence

The original Standards of Excellence were developed in 2010 at a time when NAMI was experiencing significant growth and seeking greater alignment and structure across the network. Since then, the needs and aspirations of our Alliance—and the individuals, families, and communities we exist to serve—have evolved, as have the political, social, and economic environments in which we operate.

The development of NAMI's 2030 Strategic Plan brought renewed attention to critical role that the Standards of Excellence play. The strategic plan also elevated the need to revise NAMI's Standards of Excellence to better reflect the needs of our Alliance today and to promote the long-term sustainability and impact of our Alliance moving forward.

In response, NAMI established the Strengthen the Alliance Work Group in October 2024 to steward the process of revising the Standards of Excellence. Work group members were selected to reflect the breadth of diversity and the depth of lived experience that are core to NAMI's ability to drive impact, and there was equal representation of State Organizations and Affiliates. In its work to revise the Standards of Excellence, the work group collaborated closely with NAMI National staff, consulted with other federated networks, and sought input and feedback from hundreds of field leaders.

Foundational Principles

The updated Standards of Excellence are grounded in several key beliefs:

- **We are better together.** NAMI's federated model is a source of strength that allows us to successfully pursue our shared mission at the local, state, and national levels.
- **Grassroots is core to our identity.** NAMI relies on the history and power of our grassroots to keep a pulse on and effectively serve the evolving needs of local communities in every corner of the country.
- **There is no one-size-fits-all structure.** NAMI's footprint looks different in every state, and the Standards of Excellence are designed to support that diversity, not constrain it. The standards set expectations for roles, responsibilities, and minimum requirements that any State Organization or Incorporated Affiliate in the NAMI Alliance must follow. At the same time, they are meant to allow for flexibility so that State Organizations and Affiliates can continue to tailor their work based on the local context. The standards document provides guidance and establishes expectations across the alliance, and NAMI will maintain this excellence by regularly evaluating, reviewing, and if necessary, updating it.
- **Excellence is the standard.** Every NAMI organization should aim to meet high expectations regarding their organizational effectiveness and impact. We all represent the NAMI brand, and it's important that we strive for excellence to bolster public trust in the work we do both individually and as a collective Alliance.

Good Network Citizenship

Each part of the NAMI Alliance plays a critical role in helping us to realize our shared vision for impact:

- **NAMI National** is the steward of NAMI's brand, programs, and Alliance-wide strategy, leads federal advocacy and national awareness, and provides support to State Organizations and Affiliates across the Alliance.
- **State Organizations** are the state-level stewards of NAMI's strategy, lead state-level advocacy, awareness, and fundraising, and work in partnership with Incorporated and Unincorporated Affiliates to help them deliver NAMI programs.
- **Incorporated Affiliates (formerly Model A & C)** are the programmatic engines of the NAMI Alliance and lead local advocacy, awareness, and fundraising efforts in their communities.
- **Unincorporated Affiliates (formerly Model B)** further the impact of the Alliance by delivering programs and driving awareness and outreach, while operating under the 501c3 of either a State Organization or Incorporated Affiliate.

When an organization joins the Alliance, they receive the benefits of being part of the nation's largest grassroots mental health network. This includes:

- Receiving support from NAMI National
- Being able to use NAMI's name, logo, and programs
- Gaining access to NAMI's robust Alliance of organizations and leaders that share a commitment to improving the lives of people with mental illness

In return, NAMI organizations are required to be **good network citizens**. This includes:

- Meeting all minimum requirements to earn and maintain their status as a State Organization or Affiliate

- Fulfilling the roles, responsibilities, and expectations established by the Alliance and approved by the National Board
- Acting in accordance with NAMI National's governing documents, including the bylaws and any policies or procedures adopted by the National Board
- Maintaining and advancing the public trust and reputation of NAMI

Use cases for the Standards of Excellence

The Standards of Excellence are designed to be used in a variety of ways, including:

- **Organizational effectiveness and planning:** The standards set a baseline for what's expected for 501c3 organizations that are part of the NAMI Alliance. These baseline expectations, in turn, help leaders set goals and identify areas of growth for their organizations.
- **Partnership and Alignment:** They reinforce shared commitments and expectations among National, State Organizations, and Incorporated Affiliates.
- **Accountability:** They serve as the foundation for the Alliance's review and accreditation processes, which are carried out by NAMI National.

NAMI Values

Ultimately, the Standards of Excellence will help the Alliance come together in service to NAMI's mission and our collective values:

- **Hope:** We believe in the possibility of recovery, wellness, and the potential in all of us.
- **Inclusion:** We embrace diverse backgrounds, cultures, and perspectives.
- **Empowerment:** We promote confidence, self-efficacy, and service to our mission.
- **Compassion:** We practice respect, kindness, and empathy.
- **Fairness:** We fight for equity and justice.

Governance

OBJECTIVE: NAMI organizations are governed by independent, mission-driven boards that ensure legal compliance, fiduciary responsibility, strategic oversight, transparency and accountability to the communities they serve.			
	NAMI National	State Organizations	Incorporated Affiliates
LEGAL STRUCTURE	◆ Has been granted a 501c3 tax exemption as a public charity and is appropriately incorporated as a nonprofit ◆ Comply with federal, state, and local laws and regulations ◆ Grants charters to eligible State Organizations and Affiliate status to eligible Affiliates ◆ Maintains independence from other organizations	◆ Have been granted a 501c3 tax exemption as a public charity ◆ Are appropriately incorporated as a nonprofit in the state where located ◆ Comply with federal, state, and local laws and regulations ◆ Maintain required local, state, and federal governing documents ◆ Adhere to the terms and conditions of NAMI National's governing documents, including but not limited to the NAMI Bylaws, Standards of Excellence, and the State Charter Agreement ◆ Maintain independence from other organizations ◆ Provide assistance to affiliates during NAMI affiliate model transitions	◆ Have been granted a 501c3 tax exemption as a public charity ◆ Are appropriately incorporated as a nonprofit in the state where located ◆ Comply with federal, state, and local laws and regulations ◆ Maintain required local, state, and federal governing documents ◆ Adhere to the terms and conditions of NAMI National's governing documents, including but not limited to the NAMI Bylaws, Standards of Excellence, and the Incorporated Affiliate Agreement ◆ Maintain independence from other organizations

DOMAIN KEY:

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Note: Incorporated Affiliates, formerly, Model A & C affiliates. Incorporated Affiliates are 501C3 organizations with a governing board.

Governance (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
BOARD OF DIRECTORS	◆ Governed by a voluntary, independent board of directors, elected or appointed according to the organization's bylaws ◆ Have written bylaws that comply with relevant local, state, and federal laws	◆ Governed by a voluntary, independent board of directors that are elected or appointed according to the organization's bylaws ◆ Have written bylaws and policies that comply with relevant local, state, and federal laws, avoid any conflict with National's bylaws and policies ◆ Submit bylaw amendments to NAMI prior to adoption ◆ Review affiliate bylaw amendments with assistance from National	◆ Governed by a voluntary, independent board of directors that are elected or appointed according to the organization's bylaws ◆ Have written bylaws and policies that comply with relevant local, state, and federal laws, avoid any conflict with National's bylaws and policies ◆ Submit bylaw amendments to NSO prior to adoption
	★ Offers resources (e.g., written guidance, templates, trainings) to both State Organizations and Incorporated Affiliates on effective board governance and oversight ★ Bylaws should include: ○ Governing authority of the board (e.g., responsibilities, fiduciary oversight) ○ Board structure/membership (e.g., term length, minimum number of board members, process for board member election/removal, community representation) ○ Election procedures ○ Process for amending bylaws and dissolution ○ Finances (e.g., control of assets, charitable purpose)	★ Bylaws should include: ○ Governing authority of the board (e.g., responsibilities, fiduciary oversight) ○ Board structure/membership (e.g., term length, minimum number of board members, process for board member election/removal, community representation) ○ Election procedures ○ Process for amending bylaws and dissolution ○ Finances (e.g., control of assets, charitable purpose)	★ Bylaws should include: ○ Governing authority of the board (e.g., responsibilities, fiduciary oversight) ○ Board structure/membership (e.g., term length, minimum number of board members, process for board member election/removal, community representation) ○ Election procedures ○ Process for amending bylaws and dissolution ○ Finances (e.g., control of assets, charitable purpose)

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Governance (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
AREAS OF OPERATION	◆ Approves geographic area of operation for Affiliates, based on final determination of State Organization (if one exists) ◆ Processes requests for consolidations and disaffiliations ◆ Educates and offers resources to State Organizations and Affiliates on requirements and processes for expanding/reducing geographical operations	◆ Guide and endorse (or deny) – with explanation – revisions to geographical area of operation for existing Affiliates ◆ Guide, determine, and endorse geographical area of operation for new groups	
			★ If an Affiliate submits a request to the State Organization for a revision to its geographical area of operation, provide explanation for any request to revise its geographic territory of operation.
OVERSIGHT OF UNINCORPORATED AFFILIATES	◆ Coordinates with State Organizations to review and approve Model B Affiliate applications, and then issue agreements (i.e., addendums to the State Charter Agreement that are between a State Organization and an Unincorporated Affiliate)	◆ Assume legal responsibility for the operation, activities, and fiscal oversight of Unincorporated Affiliates operating within the state	
	★ Develop standard requirements for Unincorporated Affiliates, with input from State Organizations	★ Provide regular and ongoing assistance in organizational management (managing finances, strategic planning, etc.) and compiling data on programs/activities (see Data section) ★ Provide support and oversight – in line with guidance from NAMI National – to promote consistent quality across Unincorporated Affiliates	

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People

OBJECTIVE: NAMI organizations cultivate strong, inclusive leadership and a workforce of volunteers and/or staff who are equipped, supported, and trained to deliver sustainable impact in alignment with NAMI's mission.			
	NAMI National	State Organizations	Incorporated Affiliates
EXECUTIVE LEADERSHIP	◆ Have a paid, full-time Chief Executive Officer responsible for creating and maintaining a work environment consistent with NAMI Values ◆ NAMI shall maintain compensation practices that are reasonable within its budget, legally compliant, and aligned closely with local labor market conditions. Salary ranges should reflect organizational size and complexity, be reviewed periodically by the governing board or its designee and be applied consistently to ensure transparency and equity	◆ Have a paid, part- or full-time Executive Director responsible for creating and maintaining a work environment consistent with NAMI Values ◆ Each State Organization shall maintain compensation practices that are reasonable within their budget, legally compliant, and aligned closely with local labor market conditions. Salary ranges should reflect organizational size and complexity, be reviewed periodically by the governing board or its designee and be applied consistently to ensure transparency and equity	◆ Have a paid, part- or full-time Executive Director responsible for creating and maintaining a work environment consistent with NAMI Values ◆ Any Affiliate that is small, rural, or serves underrepresented communities (See Appendix A for definitions), and who has demonstrated the ability to meet Standards and is in good standing, may be granted permission to operate under an alternative leadership model (e.g., led by an active and effective board of directors) ◆ Each Affiliate shall maintain compensation practices that are reasonable within their budget, legally compliant, and aligned closely with local labor market conditions. Salary ranges should reflect organizational size and complexity, be reviewed periodically by the governing board or its designee and be applied consistently to ensure transparency and equity

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People (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
EXECUTIVE LEADERSHIP (cont.)	★ Provides onboarding training for new Executive Directors ★ Educates Executive Directors about best practices, strategies for increasing impact via Executive Directors' Council meetings and other forums ★ Offers resources (e.g., written guidance, templates, training) to State Organizations and Incorporated Affiliates to support Executive Director recruitment, training, leadership development, and retention ★ Conduct an annual performance review of the CEO/Executive Director	★ Within 12 months of being hired, Executive Directors attend onboarding training provided by NAMI National ★ Support the onboarding of new Incorporated Affiliate Executive Directors to promote consistency across the state's Incorporated Affiliates ★ Conduct an annual performance review of the Executive Director	★ Within 12 months of being hired, Executive Directors attend onboarding training provided by NAMI National and engage with their respective State Organization to understand activities at both the state and local levels ★ Conduct an annual performance review of the Executive Director (if one exists)
BOARD OF DIRECTORS	★ Provide onboarding for board members about NAMI, requirements of chartering/affiliation, and nonprofit governance ★ Offers resources (e.g., written guidance, templates, training) to State Organizations and Incorporated Affiliates on nonprofit board best practices, including how to support effective board recruitment, development, and engagement ★ Provides training to State and Affiliate Board Presidents about the role of boards, including best practices for healthy, sustainable nonprofit organizations ★ Conduct an annual assessment of the board	★ Provide onboarding for board members about NAMI, requirements of chartering/affiliation, and nonprofit governance ★ Provide technical assistance on governance and board roles and responsibilities to affiliate boards ★ Conduct an annual assessment of the board	★ Provide onboarding for board members about NAMI, requirements of chartering/affiliation, and nonprofit governance ★ Conduct an annual assessment of the board

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People (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
STAFF	★ Offers resources (e.g., written guidance, templates, training) to help State Organizations and Incorporated Affiliates develop job descriptions, training for staff	★ Provide onboarding and training for any staff commensurate with roles and responsibilities	★ Provide onboarding and training for any staff commensurate with roles and responsibilities
VOLUNTEERS	◆ Have clearly articulated screening procedures for volunteers (e.g., for volunteers supporting programs, events, and/or advocacy efforts)	◆ Have clearly articulated screening procedures for volunteers (e.g., for volunteers supporting programs, events, and/or advocacy efforts)	◆ Have clearly articulated screening procedures for volunteers (e.g., for volunteers supporting programs, events, and/or advocacy efforts)
	★ Offers resources (e.g., written guidance, templates, training) to State Organizations and Incorporated Affiliates to support volunteer recruitment, training, and retention (e.g., for volunteers supporting programs, events, and/or advocacy efforts)	★ Provide training for volunteers commensurate with their respective roles and responsibilities	★ Provide training for volunteers commensurate with their respective roles and responsibilities

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Finance & Operations

OBJECTIVE: NAMI organizations ensure financial integrity and operational sustainability through sound fiscal practices, legal and risk compliance, succession readiness, and strategic resource management to safeguard long-term organizational health.			
	NAMI National	State Organizations	Incorporated Affiliates
FINANCIAL OVERSIGHT	◆ Have financial oversight policies and procedures including regular review of financial reports by the board of directors ◆ Create and maintain reports that accurately reflect the financial activity of the organization (e.g., financial statements) ◆ Conduct an annual audit	◆ Have financial oversight policies and procedures including regular review of financial reports by the board of directors ◆ Create and maintain reports that accurately reflect the financial activity of the organization ◆ For organizations with annual gross revenue of \$500,000 or more must obtain an independent financial audit; however, if applicable state law requires an audit or financial review at a lower threshold or under additional circumstances, those state requirements shall supersede NAMI's standard. At a minimum, every State Organization must prepare annual financial statements, and each organization is responsible for complying with all applicable state and federal financial reporting laws.	◆ Have financial oversight policies and procedures including regular review of financial reports by the board of directors ◆ Create and maintain reports that accurately reflect the financial activity of the organization ◆ For organizations with annual gross revenue of \$500,000 or more must obtain an independent financial audit; however, if applicable state law requires an audit or financial review at a lower threshold or under additional circumstances, those state requirements shall supersede NAMI's standard. At a minimum, every Affiliate must prepare annual financial statements, and each organization is responsible for complying with all applicable state and federal financial reporting laws.
	★ Offers training on best practices in financial management (e.g., creating and reading financial statements, board oversight of financials) to State Organization and Affiliate leadership, including Executive Directors and boards		

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Finance & Operations (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
BUDGET	◆ Have a board-approved budget for the current year that supports annual operations and the strategic plan. At a minimum, the budget outlines projected revenue and expenses	◆ Have a board-approved budget for the current year that supports annual operations and the strategic plan. At a minimum, the budget outlines projected revenue and expenses	◆ Have a board-approved budget for the current year that supports annual operations and the strategic plan. At a minimum, the budget outlines projected revenue and expenses
	★ Offers training on how to create a budget to support annual operations/ strategic plan for State Organization and Affiliate leadership, including Executive Directors and boards		
STRATEGIC PLANNING	◆ Develop and follow a strategic or action plan that is appropriate for the size, budget, and sustainability of the organization to serve as a roadmap to achieving key goals over a set timeframe, in service of the organization's mission and vision	◆ Develop and follow a strategic or action plan that is appropriate for the size, budget, and sustainability of the organization to serve as a roadmap to achieving key goals over a set timeframe, in service of the organization's mission and vision	◆ Develop and follow a strategic or action plan that is appropriate for the size, budget, and sustainability of the organization to serve as a roadmap to achieving key goals over a set timeframe, in service of the organization's mission and vision
	★ Offers strategic planning resources (e.g., written guidance, templates, training) to State Organization and Affiliate leadership, including Executive Directors and boards ★ Consider State Organization and Affiliate feedback in strategic planning to ensure alliance alignment	★ Consider Affiliate feedback in strategic planning to ensure statewide alignment	★ Consider State Organization feedback in strategic planning to ensure statewide alignment
SUCCESSION PLANNING	◆ Has a documented plan for succession for the Executive Director	◆ Has a documented plan for succession for the Executive Director	
	★ Offers succession planning resources (e.g., written guidance, templates, training) to State Organization and Affiliate leadership, including Executive Directors and boards	★	★ Has a documented plan for succession for the Executive Director (if applicable)

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Fund Development

OBJECTIVE: NAMI organizations secure diverse and sustainable funding while cultivating donor trust and collaboration across the Alliance, ensuring that resources are aligned with mission priorities and shared impact.			
	NAMI National	State Organizations	Incorporated Affiliates
RESOURCE DEVELOPMENT	◆ Ensure any fundraising requests and partnerships comply with federal, state, and local laws and the NAMI mission	◆ Ensure any fundraising requests and partnerships comply with federal, state, and local laws and the NAMI mission	◆ Ensure any fundraising requests and partnerships comply with federal, state, and local laws and the NAMI mission
	★ Offers resources (e.g., templates, trainings) for State Organizations and Incorporated Affiliates to support local fund development efforts ★ Pursues funding sources to support core, mission-aligned activities and ensure sustainability (e.g., philanthropy, corporate funding, government funding)	★ Offers resources (e.g., technical assistance, guidance) for Incorporated Affiliates to support compliance with federal, state, and local laws ★ Pursue funding sources to support core, mission-aligned activities and ensure sustainability for State Organization and any Model Bs under 501c3	★ Pursue funding sources to support core, mission-aligned activities
DONOR RELATIONSHIPS	◆ Prioritizes donor intent in all donor interactions ◆ Cultivate and steward relationships with donors interested in funding nationally ◆ Explicitly informs donors which level of the Alliance a donation is going to and makes a good faith effort to educate donors on the structure of the Alliance	◆ Prioritize donor intent in all donor interactions ◆ Cultivate and steward relationships with donors interested in funding at the state-level ◆ Explicitly inform donors which level of the Alliance a donation is going to be made and make a good faith effort to educate donors on the structure of the Alliance	◆ Prioritize donor intent in all donor interactions ◆ Cultivate and steward relationships with donors interested in funding at the local level ◆ Explicitly inform donors which level of the Alliance a donation is going to be made and make a good faith effort to educate donors on the structure of the Alliance

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Fund Development (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
DONOR RELATIONSHIPS (cont.)	◆ Offers resources (e.g., templates, trainings) to help State Organizations and Incorporated Affiliates communicate with funders about the structure of the Alliance ◆ Respects state and local donor relationships and applies a “do no harm” approach (refraining from knowingly soliciting another NAMI’s donors and engaging in activities that could clearly have a negative impact on another NAMI organization) ○ If working with a state- or local-level donor (based on the donor’s preference), informs the relevant State Organization or Incorporated Affiliate as a courtesy	◆ Respect national and local donor relationships and apply a “do no harm” approach (refraining from knowingly soliciting another NAMI’s donors and engaging in activities that could clearly have a negative impact on another NAMI organization) ○ If working with a national- or local-level donor (based on the donor’s preference), inform NAMI National or the relevant Incorporated Affiliate as a courtesy	◆ Respect donor relationships of National, State Organization, and nearby Affiliates and apply a “do no harm” approach (refraining from knowingly soliciting another NAMI’s donors and engaging in activities that could clearly have a negative impact on another NAMI organization) ○ If working with a national- or state-level donor (based on the donor’s preference), inform NAMI National or the State Organization as a courtesy

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Fund Development (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
COLLABORATION BETWEEN ENTITIES OF THE ALLIANCE	◆ When pursuing collaborative fundraising/revenue sharing, negotiates and agrees to abide by terms contained in a written agreement with all participating parties	◆ When pursuing collaborative fundraising/revenue sharing, negotiate and agree to abide by terms contained in a written agreement with all participating parties	◆ When pursuing collaborative fundraising/revenue sharing, negotiate and agree to abide by terms contained in a written agreement with all participating parties
	★ Offers resources (e.g., written guidance, templates, trainings) to support collaboration among State Organizations and Incorporated Affiliates, including templates for memorandums of understanding ★ If asking another NAMI organization to support a fundraising effort (e.g., attending an event, speaking to a donor), works with them to find a mutually beneficial arrangement in recognition of the time/effort the other NAMI organization is contributing	★ If a State Organization asks an Incorporated Affiliate to play a role in implementing funding (e.g., delivering on a grant), bring the relevant Incorporated Affiliate(s) into the conversation as early as possible in the process of pursuing the funding, so the Incorporated Affiliate(s) can provide input into what will be feasible to implement ★ If asking another NAMI organization to support a fundraising effort (e.g., attending an event, speaking to a donor), work with the other NAMI organization(s) to find a mutually beneficial arrangement in recognition of the time/effort the other NAMI organization is contributing	★ If an Incorporated Affiliate asks its State Organization to play a role in implementing funding (e.g., delivering on a grant), bring the State Organization into the conversation as early as possible in the process of pursuing the funding, so the State Organization can provide input into what will be feasible to implement ★ If asking another NAMI organization to support a fundraising effort (e.g., attending an event, speaking to a donor), work with the other NAMI organization(s) to find a mutually beneficial arrangement in recognition of the time/effort the other NAMI organization is contributing
MASS FUNDRAISING ACTIVITIES	◆ Adhere to fundraising calendars and agreements with other NAMI organizations/entities of the Alliance (e.g., blackout dates, revenue-sharing agreements) ◆ Inform State Organizations and Incorporated Affiliates of mass fundraising activities, including direct mail schedules, target drop dates, and event dates	◆ Adhere to fundraising calendars and agreements with other NAMI organizations/entities of the Alliance (e.g., blackout dates, revenue-sharing agreements) ◆ Inform Incorporated Affiliates of mass fundraising activities, including direct mail schedules, target drop dates, and event dates	◆ Adhere to fundraising calendars and agreements with other NAMI organizations/entities of the Alliance (e.g., blackout dates, revenue-sharing agreements) ◆ Inform State Organization of mass fundraising activities, including direct mail schedules, target drop dates, and event dates

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Fund Development (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
NAMIWALKS & NAMI DO-IT-YOUR-WAY	◆ Owns and controls the NAMIWalks brand; determines which State Organizations and Affiliates qualify as eligible NAMIWalks license holders and approves applications for all NAMIWalks licenses ◆ Owns and controls the NAMI Do-It-Your-Way brand; determines which State Organizations and Affiliates qualify as eligible NAMI Do-It-Your-Way license holders and approves applications for all NAMI Do-It-Your-Way licenses		
		★ When approved by NAMI National, can operate a Classic NAMIWalks in accordance with the NAMIWalks model and license agreement ○ Can pursue a NAMIWalks Partner Agreement to partner with other NAMIWalks eligible organizations ★ As part of the vetting process for new walks, State Organizations can provide feedback on any Affiliate application in their network (the final decision lies with NAMI National) ★ When approved by NAMI National, can obtain a Do-It-Your-Way license agreement	★ When approved by NAMI National, can operate a Classic NAMIWalks in accordance with the NAMIWalks model and license agreement ○ Can pursue a NAMIWalks Partner Agreement to partner with other NAMIWalks eligible organizations ● When approved by NAMI National, can obtain a Do-It-Your-Way license agreement

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Programs

OBJECTIVE: NAMI organizations deliver high-quality, evidence-based programs with fidelity, tailored to meet the evolving needs of diverse communities, and ensure equitable access to mental health education and support.			
	NAMI National	State Organizations	Incorporated Affiliates
NATIONAL NAMI PROGRAM COORDINATION & DELIVERY	◆ Provides program policies and training for how to deliver National NAMI Programs with fidelity ◆ Establish policies and procedures for tailoring existing National NAMI Programs to be responsive to varying needs across different communities while maintaining fidelity ◆ Provides support and technical assistance for program directors and coordinators on best practices for managing National NAMI programs and leader education ◆ Provides and maintains a central database for program reporting	◆ Adheres to the program policies and training for how to deliver NAMI Programs with fidelity ◆ Oversee program delivery of Unincorporated Affiliates (at least 1 National NAMI Program) that are under the State Organization's 501c3, maintaining program fidelity	◆ Adheres to the program policies and training for how to deliver NAMI Programs with fidelity ◆ Operate at least 2 National NAMI Programs (1 for families and 1 for peers), maintaining program fidelity (See Appendix B for definitions and examples)
		★ Assess availability of and demand for National NAMI Programs across the state and work with Affiliates to plan for programmatic growth, especially in currently underserved areas ★ When there are gaps in programming that Affiliates cannot fill, may provide programming directly ★ Provide technical assistance on program fidelity and leader certification to affiliates	★ Assess availability of and demand for National NAMI Programs within geographic region and plan for programmatic growth in underserved areas ★ Promote equitable access to programs and classes for currently underserved communities

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Programs (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
TRAINING	◆ Provides train-the-trainer trainings to prospective certified state trainers for programs & support groups ◆ Provides a calendar for NSOs to share information on state-level facilitator trainings (in-person and virtual) so that State Organizations know what trainings are being offered in other states and when	◆ Provide access to trainings for National NAMI Program leaders, usually through direct provision of trainings ◆ Share state-level training schedule with other State Organizations via National calendar ◆ Maintain a list of certified state trainers (for program leader trainings) across the state ◆ Maintain a sufficient number of state trainers and program leaders based on program demand and need	
	★ Provides support when there are training bottlenecks for certified state trainers or program leaders	◆ When a State Organization is unable to offer a given program leader training within 3 months, connect the Affiliate to training opportunities (including virtual options) in other states	◆ When a State Organization is unable to offer training, Affiliates may pursue alternative means to offer program leader training for programs or support group facilitators but must get State Organization approval. ○ Trainings must be led by certified state trainers

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Programs (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
PROGRAM DEVELOPMENT & UPDATES	◆ Develops, evaluates, and updates National NAMI Programs in response to evolving needs and with input from State Organizations and Affiliates ◆ Vets and signs off on potential adaptations to NAMI Signature Programs based on submissions from Incorporated Affiliates and State Organizations	◆ Submits a needs request to NAMI National when interested in adapting or translating a National NAMI Program based on local need	◆ Submits a needs request to NAMI National when interested in adapting or translating a National NAMI Program based on local need
	★ Coordinate with the field to provide translated materials and resources for National NAMI Programs, as is feasible ★ Seeks innovative programming from the field to test and share, particularly programs proven to effectively reach currently underserved communities	★ Share innovations in programming with NAMI National, particularly programs proven to effectively reach currently underserved communities ★ Share innovations in programming with affiliates ★ Collaborate with affiliates of program development ★ Elevate feedback on National NAMI Programs (and related trainings) to NAMI National ★ Assist affiliates in elevating program feedback to National	★ Share innovations in programming with State Organization and NAMI National, particularly programs proven to effectively reach currently underserved communities ★ Elevate feedback on National NAMI Programs (and related trainings) to NAMI National

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Advocacy

OBJECTIVE: NAMI organizations engage in coordinated advocacy at the local, state, and national levels to influence policy, mobilize grassroots voices, and advance equity and justice for people with mental illness and their families.			
	NAMI National	State Organizations	Incorporated Affiliates
POLICY LEADERSHIP	◆ Lead on all FEDERAL advocacy efforts (e.g., with federal agencies, Presidential Admin, and Congress) ○ Defer to State Organizations and Affiliates on state and local issues ◆ Develop and communicate NAMI Alliance-wide public policy positions ○ Solicit input from the field to inform policy positions	◆ Lead on all STATE-LEVEL advocacy efforts (e.g., with state legislatures, state agencies, and governors) ○ When engaging in federal policy activities, align with NAMI National on all federal/national issues ○ Consult with NAMI National before engaging in federal policy activity; in any approved federal policy activity, represent the federal position taken by NAMI National ○ Consult with relevant Incorporated Affiliate(s) before engaging in local policy activity and defer to Affiliates on local issues	◆ Lead on all LOCAL advocacy efforts (e.g., in their county, city, or school district) ○ When engaging in federal policy activities, align with NAMI National on all federal/national issues ○ Consult with NAMI National before engaging in federal policy activity; in any approved federal policy activity, represent the federal position taken by NAMI National ○ When engaging in state policy activities, align with State Organization on all state-level issues ○ Consult and collaborate with State Organization before engaging in state policy activity; in any approved state policy activity, represent the position taken by the State Organization
	★ Form and/or participate in national coalitions and partnerships with other organizations to advance federal policy goals and NAMI's mission, while maintaining independence as a 501c3 organization	★ Form and/or participate in state coalitions and partnerships with other organizations to advance state policy goals and NAMI's mission, while maintaining independence as a 501c3 organization	★ Form and/or participate in local coalitions and partnerships with other organizations to advance local policy goals and NAMI's mission, while maintaining independence as a 501c3 organization

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Advocacy (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
ADVOCACY MOBILIZATION AND TRAINING	◆ Drive advocate actions and mobilization on FEDERAL policy priorities ◆ Provide advocacy training programs and materials (e.g., Smarts for Advocacy, skills-based webinars, etc.) to State Organizations and Incorporated Affiliates ◆ Educate State Organizations and Affiliates on federal issues and opportunities for engagement	◆ Drive advocate actions and mobilization on STATE policy priorities	◆ Drive advocate actions and mobilization on LOCAL policy priorities
		★ Respond to federal advocacy alerts shared by NAMI National ★ Conduct advocacy trainings (e.g., Smarts for Advocacy) ★ Educate Affiliates and grassroots participants on state policy issues and opportunities for engagement	★ Respond to state and federal advocacy alerts shared by the State Organization and NAMI National ★ Conduct advocacy trainings (e.g., Smarts for Advocacy) ★ Educate community and grassroots participants on local issues
COLLABORATION BETWEEN ENTITIES OF THE ALLIANCE	★ Solicit feedback from State Organization and Affiliate leadership about state and local problems or concerns that may be improved or addressed at the federal level, including challenges that disparately impact underserved communities and people with mental illness ★ Engage State Organization and Affiliate leadership to build relationships with/respond to inquiries from federal policymakers	★ Work with Affiliate leadership to identify problems or concerns that would need to be solved at the state level, including challenges that disparately impact underserved communities and people with mental illness ★ Share information with NAMI National staff about issues facing the state that need to be solved at the federal level	★ Work with the community to identify problems or concerns that would need to be solved on the local level, including challenges that disparately impact underserved communities and people with mental illness ★ Update State Organization on issues facing the local community that need to be solved at the state level and update NAMI National on issues to be solved at the NAMI National level

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Data on Impact and Quality

OBJECTIVE: NAMI organizations collect, protect, and use data responsibly to ensure confidentiality, demonstrate impact, drive continuous improvement, and strengthen accountability across the Alliance.			
	NAMI National	State Organizations	Incorporated Affiliates
DATA COLLECTION & SUBMISSION	◆ Maintains NAMI's data management system ◆ Identifies and standardizes key metrics on impact and quality with input from State Organizations and Affiliates and collects data at the state and local levels, related both to NAMI Programs and other activities ◆ Share data back with the field ◆ If additional data is needed from State Organizations or Incorporated Affiliates above and beyond what National requires (e.g., to fulfill grant and/or legal requirement), ensure the request for the additional data does not create an undue burden ○ In recognition of the time and resources that submitting additional data may require, communicate why the data is needed, provide sufficient time for organizations to submit the data, and limit the request to only the necessary data	◆ Collect data for key impact and quality metrics, identified by NAMI National ◆ Submit required data for key impact and quality metrics to NAMI National, using NAMI's data management system ○ This includes collecting and submitting data for Unincorporated Affiliates under the State Organization's 501c3 ◆ If additional data is needed from Incorporated Affiliates above and beyond what National requires (e.g., to fulfill grant and/or legal requirements), ensure the request for the additional data does not create an undue burden ○ In recognition of the time and resources that submitting additional data may require, communicate why the data is needed, provide sufficient time for Incorporated Affiliates to submit the data, and limit the request to only the necessary data	◆ Collect data for key impact and quality metrics, identified by NAMI National ◆ Submit required data for key impact and quality metrics to NAMI National, using NAMI's data management system ○ This includes collecting data from Unincorporated Affiliates under the Incorporated Affiliate's 501c3 ○ Submit additional data on NAMI's impact to the State Organization or National upon request
		★ Assist affiliates with training and guidelines for data entry and reporting on programs, leadership updates, and contact information	

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Data on Impact and Quality (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
DATA MANAGEMENT	◆ Maintains documented policies and procedures regarding the security and protection of its data and systems ○ Ensure that user access and permissions within NAMI's data records align with its data governance and privacy policies	◆ Maintain documented policies and procedures regarding the security and protection of data and systems ○ Ensure that user access and permissions within the State Organization's data records align with NAMI's data governance and privacy policies	◆ Maintain documented policies and procedures regarding the security and protection of data and systems ○ Ensure that user access and permissions within the Affiliate's data records align with NAMI's data governance and privacy policies
	★ Offers a template data protection policy that State Organizations and Incorporated Affiliates can modify to meet their needs		

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Marketing & Communications

OBJECTIVE: NAMI organizations consistently and effectively use the NAMI brand to raise awareness, engage communities, and advance public understanding of mental health, reinforcing trust in the Alliance.			
	NAMI National	State Organizations	Incorporated Affiliates
THE NAMI BRAND	◆ Develops and maintains (1) identity guidelines related to the use and presentation of the NAMI name and logo and (2) NAMI language and style guidelines ◆ Sets naming guidelines for NAMIs	◆ Adhere to the NAMI identity guidelines—both in design/branding and in editorial style—in all publications and communications, whether in print or electronic media. ◆ Utilize, display, and incorporate NAMI logo and trademarks in conformity with NAMI National guidelines	◆ Adhere to the NAMI identity guidelines—both in design/branding and in editorial style—in all publications and communications, whether in print or electronic media. ◆ Utilize, display, and incorporate NAMI logo and trademarks in conformity with NAMI National guidelines
	★ Offers resources (e.g., written guidance, templates, training) on branding	★ Seeks guidance from NAMI National for development and use of event-specific logos (e.g., for heritage months, anniversaries)	★ Seeks guidance from NAMI National for development and use of event-specific logos (e.g., for heritage months, anniversaries)
AWARENESS AND COMMUNITY ENGAGEMENT	◆ Communicate with stakeholders to promote awareness of and action on mental health	◆ Communicate with stakeholders to promote awareness of and action on mental health ◆ Regularly communicates with affiliates regarding statewide events, public policy updates, and NAMI National initiatives	◆ Communicate with stakeholders to promote awareness of and action on mental health
WEBSITE	◆ Maintains NAMI National's website	◆ Maintain a website in accordance with guidelines set forth by NAMI National	◆ Maintain a website in accordance with guidelines set forth by NAMI National

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Marketing & Communications (Continued)

	NAMI National	State Organizations	Incorporated Affiliates
SOCIAL MEDIA	◆ Publishes social media guidelines for State Organizations and Affiliates ◆ Maintain NAMI National's social media	◆ If using social media, adhere to social media guidelines published by NAMI National ◆ Have social media policies and procedures, which include the requirement that more than one individual has access to any social media accounts ◆ Clearly state the organization's name (e.g., NAMI Alabama) on all social media accounts ◆ Any fundraising requests shared via social media must be in compliance with federal, state, and local laws regarding nonprofit charitable solicitations	◆ If using social media, adhere to social media guidelines published by NAMI National ◆ Have social media policies and procedures, which include the requirement that more than one individual has access to any social media accounts ◆ Clearly state the organization's name (e.g., NAMI Orange County CA) on all social media accounts ◆ Any fundraising requests shared via social media must be in compliance with federal, state, and local laws regarding nonprofit charitable solicitations
	★ Shares content for social media campaigns with State Organizations and Affiliates		
WORKING WITH THE NEWS MEDIA	◆ Leads on NATIONAL media outreach and response, working proactively and reactively with national outlets – including issue focused outlets with a national audience – to ensure aligned messaging ◆ If a LOCAL media outlet contacts NAMI National, engages the appropriate NAMI State Organization or Affiliate	◆ Lead on STATE-LEVEL media outreach and response, working proactively and reactively with media outlets to ensure aligned messaging ◆ Forward all NATIONAL media inquiries to NAMI National and LOCAL inquiries to the appropriate Affiliate	◆ Lead on LOCAL-LEVEL media outreach and response, working proactively and reactively with media outlets to ensure aligned messaging ◆ Forward all NATIONAL media inquiries to NAMI National and STATE-LEVEL inquiries to the State Organization
		★ Refrain from pitching stories to national or out-of-state news outlets	★ Refrain from pitching stories to national or out-of-area news outlets

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APPENDIX A - Alternative Leadership Model Definitions

Small Affiliate	Rural Affiliate	Underrepresented Affiliate
Definition Basis: Since there is no universally accepted “small nonprofit” threshold from reliable sources (i.e., IRS, U.S. Small Business Administration, National Council of Nonprofits), this definition supports using a state-law audit threshold as a foundation for defining “Small Affiliate”. The classification should emphasize functional criteria (e.g., revenue below audit threshold, staffing size, local scope) rather than a fixed dollar figure. Definition: A “Small Affiliate” is one that: • Reports annual gross revenue below its state’s statutory financial audit or financial review requirement, and • Employs one or zero FTE (full-time equivalent) staff, and • Operates within a single local jurisdiction without multi-county program delivery. Affiliates meeting these conditions may be eligible to operate under an alternative leadership model approved by NAMI National. Eligibility Checklist (must meet at least 2 of 3): • Annual revenue is below the state-mandated audit threshold (e.g., \$2 million in California, \$1 million in New York, \$500,000 in Rhode Island, etc.). • Employs no more than two full-time equivalent staff or operates primarily through volunteers or part-time staff. • Provides programs and services within a limited, locally defined geographic area.	Definition Basis: Adapted from U.S. Department of Agriculture (USDA) Rural-Urban Continuum Codes and the Health Resources & Services Administration (HRSA) Rural Health Grants Eligibility Analyzer, which classify communities based on population density and proximity to urbanized areas. Definition: A “Rural Affiliate” is one that solely operates in a county or census tract designated as “rural” or “non-metropolitan” by the USDA, HRSA, or U.S. Census Bureau; and where population density and infrastructure limit access to behavioral health resources and professional nonprofit leadership. Eligibility Checklist (must meet at least 2 of 3): • Located in a county or census tract classified as rural or non-metropolitan by USDA, HRSA, or the U.S. Census Bureau. • Serves a primary population of 20,000 or fewer residents. • Faces geographic, economic, or workforce limitations that make sustaining full-time paid executive leadership impractical.	Definition Basis: Derived from the U.S. Department of Housing and Urban Development (HUD) definitions of low- and moderate-income (LMI) areas, and the Federal Housing Finance Agency (FHFA) and U.S. Census Bureau criteria for underserved and minority-majority communities. Definition: An “Underrepresented Affiliate” is one that: • Serves or represents a racial, ethnic, linguistic, socio-economic, or cultural community that has historically experienced inequitable access to mental health care, • Demonstrates leadership and programming that reflect the demographics of its service area, and • Operates in a community where organizational resources are still emerging or developing. Eligibility Checklist (must meet at least 2 of 3): • Serves a population where at least 30% identify as part of a racial, ethnic, or other historically marginalized group, or where median income is below 80% of the local area median (HUD/FHFA standard). • Has a mission, programmatic focus, or partnerships explicitly designed to increase access for underrepresented or marginalized communities. • Demonstrates community representation in leadership (e.g., board or program leads reflect the populations served).

APPENDIX B - Definition of Peer and Family Program

NAMI Peer Programs	NAMI Family Programs	Other NAMI Programs
NAMI Peer Programs are National Education Program led by a Peer in recovery, who has either been diagnosed with-or has experienced symptoms of-a serious mental illness. These programs are managed by NAMI National and include standardized program leader training and certification. NAMI Peer Programs are delivered by certified Program Leaders who are affiliated with, and supported by, a NAMI State Organization or Incorporated Affiliate. These programs adhere to NAMI National’s Education Program Policies and Procedures. The following are NAMI Peer Programs: ● NAMI Connection Support Group ● NAMI Ending the Silence (ETS) for Students ● NAMI Ending the Silence (ETS) for Family Caregivers ● NAMI Ending the Silence (ETS) for School Professionals ● NAMI In Our Own Voice (IOOV) ● NAMI Peer-to-Peer ● NAMI Provider ● NAMI Sharing Your Story with Law Enforcement (SYSLE)	NAMI Family Programs are National Education Programs led by family caregivers who have a loved one diagnosed with—or who has experienced symptoms of—a serious mental illness. These programs are managed by NAMI National and include standardized program leader training and certification. NAMI Family Programs are delivered by certified Program Leaders who are affiliated with and supported by a NAMI State Organization or Affiliate. These programs adhere to NAMI’s National Education Program Policies and Procedures. ● NAMI Basics ● NAMI Ending the Silence (ETS) for Students ● NAMI Ending the Silence (ETS) for Family Caregivers ● NAMI Ending the Silence (ETS) for School Professionals ● NAMI Family and Friends ● NAMI Family-to-Family ● NAMI Family Support Group ● NAMI Homefront ● NAMI Provider	NAMI Programs that do not currently meet the standards of a NAMI Peer or NAMI Family Program: ● NAMI Faithnet – Program is neither a course, presentation or support group nor does it adhere to the NAMI Education Program Policies and Procedures. ● NAMI Hearts and Minds – Program does not adhere to the NAMI Education Program Policies and Procedures or have formalized training and certification. ● NAMI On Campus – Program does not meet formalized training or certification requirements, is not lead by a person with lived experience nor does it adhere to the NAMI Education Program Policies and Procedures. ● NAMI SMARTS – Program currently does not adhere to NAMI Education Program Policies and Procedures. ● NAMI Sharing Hope Series – Programs currently can be offered by an organization without the support of a NAMI State or Affiliate organization and does not adhere to the NAMI Education Program Policies and Procedures. This includes Sharing Hope, NAMI Compartiendo Esperanza, NAMI Chai and Chat, and NAMI Sacred Circle