



NAMI Roles and Responsibilities

NAMI is dedicated to building better lives for the millions of Americans affected by mental health conditions. The ability to increase our impact relies heavily on NAMI, NAMI State Organizations, and NAMI Affiliates working cooperatively and collaboratively. To achieve our goals, it is vital to have a shared understanding of 1) the fundamental organizational roles, responsibilities, and expectations that every NAMI organization plays in our NAMI alliance; and 2) how the three parts of NAMI can operate collaboratively to get better results.

This document is based on the Standards of Excellence (SoE) and was developed to enhance communication, learning, transparency, and awareness of the recurrent activities performed and contributions made by each part of our NAMI alliance. It should be noted that this document is not a comprehensive list, but is intended to provide a representative summary of the key roles and responsibilities of NAMI, NAMI State Organizations, and NAMI Affiliates.

In addition, to reflect NAMI's diverse range of organizations, this document includes input from a cross-section of NAMI State Organizations and NAMI Affiliates. Input was collected from NAMI State Organization and NAMI Affiliate executive directors who attended the 2016 Executive Directors Leadership Exchange (EDLE) in December and/or completed a follow-up survey sent out through the listserv of the NAMI Executive Directors Council in January 2017. Moreover, the workgroup assembled during EDLE reviewed and provided feedback on prior drafts. Lastly, representatives from a sample of NAMI State Organizations and NAMI Affiliates that vary geographically, reflect various sizes (small, medium, and large), and have a mix of staff structures (operated by paid and/or volunteer staff) reviewed and provided feedback on prior drafts.

This document outlines NAMI's collaborative approach and fosters mutual understanding of the roles and responsibilities of NAMI, NAMI State Organizations, and NAMI Affiliates. As a NAMI leader, we hope you will find this document a helpful resource to clarify the important role your organization plays in our NAMI alliance and improve our work both individually and collectively.

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NAMI National Organization	NAMI State Organizations (NSO)	NAMI Affiliates – All Models (NA) ¹
Governance		
<ul style="list-style-type: none"> • Maintain Board of Directors (BoD); operating policies and procedures; 501(c)3 status and filings; records and information; Insurance; and Standards of Excellence (SoE) • Resolve disputes; secure third-party financial oversight for NAMI at the national level; develop NAMI’s strategic plan; provide strategic direction for NAMI • Re-charter NAMI State Organizations and Reaffiliate NAMI Affiliates with NAMI. • Grant initial Affiliation and use of NAMI name to new groups seeking affiliation with NAMI • Guide NSO on NA geographical expansion of operations, merges, dissolutions and name changes • Maintain relationship with NAMI advisory councils 	<ul style="list-style-type: none"> • Maintain State BoD and BoD Operating Policies; Maintain current IRS 501(c)3 documentation; records and information • Secure third-party financial oversight; exemplify NAMI bylaws, mission, values, and policies • Adhere to SoE by uploading and updating required governance documents to the Profile Center • Guide Affiliates through the reaffiliation process; endorse Affiliates for reaffiliation • Guide, endorse, and decide on geographical area of operation for new groups and geographic expansion for existing Affiliates. 	<ul style="list-style-type: none"> • Incorporated and exempt Affiliates maintain Affiliate BoD and BoD Operating Policies; current IRS 501(c)3 documentation, records and information Unincorporated Affiliates operate by their incorporated parent organization’s governing and operating policies and procedures • Secure third-party financial oversight; exemplify NAMI bylaws, mission, values, and policies • Ensure all governance documents are up-to-date and uploaded to the Profile Center • New Groups adhere to NAMI and SoE guidance on initial affiliation with NAMI • All Affiliates request permission to expend their geographical area of operation in writing to NAMI and NSO

¹ NAMI Affiliates operating in states where there is no NAMI State Organization should assume the NSO roles and responsibilities as appropriate, and until a NSO is established. For further guidance and questions contact fieldcapacity@nami.org.

Communications and Marketing

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| <ul style="list-style-type: none"> • Maintain national website; work with national media • Provide guidance on working with media • Create public awareness campaigns; establish national partnerships • Deliver annual national convention • Board of Directors (BoD) set NAMI branding and identity policies (i.e., naming and logo guidelines) • Maintain NAMI Network—NAMI 360, NAMI Walks, SharePoint, Profile Center, etc. • Develop and distribute information and resources to help NAMI State Organizations and Affiliates communicate NAMI priorities, assist families and individuals, and educate stakeholders • Manage and operate NAMI HelpLine to connect families and individuals to NAMI state and affiliate organizations | <ul style="list-style-type: none"> • Maintain state website; work with state media • Support national and state public awareness campaigns • Promote national partnerships • Deliver State Conference • Develop state level partnerships to educate, increase awareness, decrease stigma, and improve state mental health systems • Adhere to NAMI branding and identity policies. • Ensure Affiliates follow trainings and guidelines on data entry and reporting on programs, membership, leadership changes and contact information • Maintain and distribute regular newsletter communication, updates, and reports from NSO and NAMI to Affiliates • Develop and distribute information and resources to communicate NAMI priorities, assist families and individuals, and educate state and local level stakeholders • Manage and operate State HelpLine to connect families and individuals to NAMI Affiliates | <ul style="list-style-type: none"> • Maintain Affiliate website; work with local media • Support national, state and local public awareness campaigns • Promote national partnerships • Participate in NAMI State Conference, meetings, and events • Maintain close communication with NSO keeping them updated on all affiliate activities • Develop local level partnerships to educate, increase awareness, decrease stigma and improve state and local mental health systems • Adhere to NAMI branding and identity policies. • Follow trainings and guidelines on data entry and reporting on programs, membership, leadership changes and contact information in NAMI 360 on regular basis • Provide new leadership and local representative information to State Organization • Distribute information and resources to communicate NAMI priorities, assist families |
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		<p>and individuals, and educate local-level stakeholders</p> <ul style="list-style-type: none"> • Respond to local HelpLine inquiries
<p>Diversity and Inclusion</p>		
<ul style="list-style-type: none"> • Do not discriminate against any person or group • Actively recruit, engage and serve members from every race, culture, ethnicity, age, religion, socio-economic status, sexual orientation, gender, gender identity and disability • Embrace the broadest definition of inclusion and nondiscrimination in all pertinent documents such as bylaws and policies and procedures • Encourage NAMI Affiliates to offer multiple support groups beyond their baseline family and/or consumer groups, whenever there is a demand • Provide technical assistance and related Materials to support reaching diverse communities • Offer NAMI State Organizations technical assistance to support recruitment and retention of a diverse and inclusive membership and leadership. 	<ul style="list-style-type: none"> • Do not discriminate against any person or group • Actively recruit, engage and serve members from every race, culture, ethnicity, age, religion, socio-economic status, sexual orientation, gender, gender identity and disability • Embrace the broadest definition of inclusion and nondiscrimination in all pertinent documents such as bylaws and policies and procedures • Promote and mentor NAMI Affiliate diversity and inclusion efforts 	<ul style="list-style-type: none"> • Do not discriminate against any person or group • Actively recruit, engage and serve members from every race, culture, ethnicity, age, religion, socio-economic status, sexual orientation, gender, gender identity and disability • Embrace the broadest definition of inclusion and nondiscrimination in all pertinent documents such as bylaws and policies and procedures •

Fundraising		
<ul style="list-style-type: none"> Secure funding to allow for: the development and distribution of education programs; national communication assets to increase NAMI name recognition; allow for NAMI’s voice to be heard and recognized on federal policy; support the grassroots through training and technical assistance on operational responsibilities including governance and fundraising Develop fundraising agreements and guidelines Communicate annual schedule for NAMI Solicitations; partners with NSO and NA on joint fundraising initiatives when possible 	<ul style="list-style-type: none"> Adhere to fundraising agreements and guidelines; ensures Affiliates do the same Follow NAMIWalks model and agreements 	<ul style="list-style-type: none"> Adhere to fundraising agreements and guidelines Follow NAMIWalks model and agreements
Membership		
<ul style="list-style-type: none"> NAMI BoD set standard dues and membership categories Maintain membership records (NAMI 360); provides NAMI 360 training Oversee distribution of membership dollars to State and Affiliates based on local share agreements 	<ul style="list-style-type: none"> Ensure members pay standard NAMI dues Ensure all memberships are in NAMI 360 Negotiate and communicate local share agreements on dues 	<ul style="list-style-type: none"> Ensure members pay standard NAMI dues Ensure all memberships are in NAMI 360 Engage in state-led negotiation on local share agreement on dues

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Policy and Advocacy		
<ul style="list-style-type: none"> • NAMI BoD establish and approve NAMI Public Policy priorities, platforms and messaging; solicits input from NAMI grassroots via Advisory Councils • Represent NAMI on a federal level; cultivate relationships with federal officials and agencies; work with partners and coalitions; track legislation and issues; publish policy reports • Train, assist and provide resources to State Advocacy leaders and groups 	<ul style="list-style-type: none"> • NAMI State BoD establish priorities and state policy platforms that align with NAMI Policy Platform; State Public Policy Committees make recommendations to the BoD • Represent NAMI on a state level; cultivate relationships with state officials and agencies; work with partners and coalitions; track state legislation; lead state advocacy efforts; support NAMI advocacy efforts; facilitate advocacy trainings 	<ul style="list-style-type: none"> • NAMI Affiliate BoD establish priorities and local policy platforms that align with the NAMI and NAMI State Organization Policy Platforms • Provide policy agenda input to State organization • NAMI Affiliate Advocacy representatives work with State Advocacy Committee • In coordination with the State and NAMI develop relationships with federal and state, officials and agencies; Independently develop local relationships • Drive grassroots action in support of NAMI state and federal priority issues
NAMI Programs		
<ul style="list-style-type: none"> • Develop and update evidence-based (or best practice) education and support programs; set policies that regulate the provisions of programs • Develop and maintain processes for data collection and reporting; trains on data collection 	<ul style="list-style-type: none"> • Adhere to NAMI program policies; train NAMI signature program facilitators; maintain program fidelity; report issues to NAMI • Develop and implement programs based on state-specific needs 	<ul style="list-style-type: none"> • Adhere to NAMI program policies; organizes and implements support groups and education classes; maintain program fidelity; report data on education programs and support



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<ul style="list-style-type: none">• Analyze and report data delivery and program outcomes	<ul style="list-style-type: none">• Provide trainings and technical assistance to NAMI affiliates	<ul style="list-style-type: none">• Develop and implement programs that align with state priorities and are based on community needs
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