



NAMI National Education Programs

Operating Policies, 2017

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These policies replace all previous versions of program policies

These are also located in all NAMI program manuals

Overview

NAMI national education programs (NAMI programs) are the intellectual property of NAMI. They are developed and owned by NAMI. They include NAMI Basics, NAMI Connection Recovery Support Group, NAMI Ending the Silence, NAMI Family-to-Family, NAMI Family Support Group, NAMI Homefront, NAMI In Our Own Voice, NAMI Parents & Teachers as Allies, NAMI Peer-to-Peer, NAMI Provider and any cultural adaptations and/or translations of these programs. NAMI considers online programs, seminars, trainings and workshops to be program adaptations, in which case all policies apply.

NAMI has invested considerable time and resources in the development, maintenance and technical support of each of these programs to ensure they address the goals and mission of NAMI. NAMI is dedicated to ensuring these programs represent NAMI accurately when they are provided in communities. The following operating policies have been developed to ensure the ongoing provision of consistent and quality programming at all levels of NAMI.

NAMI State Organizations (NSO) and NAMI Affiliates (NA), their board of directors and staff may not set policies at variance with the NAMI national education program policies stated below. These policies are also to be followed by certified NAMI program leaders (i.e., teachers, mentors, presenters, facilitators) and trainers.

Any operational issues not covered below should be addressed by the NSO in accordance with all applicable laws in their respective state.

Access to NAMI programs and materials

- NAMI programs are the intellectual property of NAMI
- NAMI grants access to program manuals and materials to NSOs who have sought and obtained permission from NAMI to bring that program to their state
- NAs are granted access to these intellectual properties via their NSO
- NAMI programs are only available through NSOs and NAs
- In return for access to the NAMI programs, the NSO and NAs are expected to maintain the fidelity of the programs and report participation data of all trainings, classes, presentations and support groups at www.nami.org/programdata

Copyright

- All NAMI program material is copyrighted and can only be used by certified program leaders for the intended audiences
- Permission to use any material in a setting other than a NAMI program must be sought from and given by NAMI national staff in advance. In every case where permission is granted, NAMI must be referenced as the source of the material.
- No portions of a NAMI program may be used as a component for other program development or presentation

- No group or individual outside of NAMI can rewrite any of the NAMI program materials
- Permission to culturally adapt and/or translate NAMI programs and materials in either written or verbal form into another language must be sought from and given by NAMI in advance and follow NAMI procedures regarding cultural adaptation and/or translation

Confidentiality

- All NAMI programs are built around the principles of mutual trust and respect among participants and leaders
- All NAMI program leaders are trained in the importance of creating and maintaining an atmosphere of respect in NAMI classes, presentations and support groups that is conducive to participants' ability to gain valuable information and support regarding mental illness
- This atmosphere of respect includes the assurance of complete confidentiality regarding participation in NAMI programs as well as any information shared by participants about themselves or others
- The only exception to this expectation of confidentiality is in a circumstance involving potential harm to a participant or someone else
- Audio or videotaping during any NAMI programs is not permitted

Code of Conduct

- Program leaders are representatives of NAMI and NAMI holds these leaders to certain standards of conduct during the provision of NAMI services
- The Code of Conduct document is covered during program leader trainings and is included in all NAMI program manuals



NAMI National Education Programs Code of Conduct, 2017

NAMI national education programs are built around the principles of mutual trust and respect among participants and leaders. Certified program leaders are representatives of NAMI and NAMI holds these leaders to certain standards of conduct during the provision of NAMI services. This Code of Conduct is covered during leader trainings and is included in all NAMI program manuals so that participants also know what to expect from NAMI programs.

What we ask of you as a NAMI national education program participant:

- Attend programs with an open mind and open heart
- Maintain the confidentiality of all participants by not discussing personal topics outside the program
- Take from the program the information that you believe is most helpful for you
- Find an atmosphere of support in the program that enables you to feel comfortable sharing with others, knowing that what you share will be respected and held in confidence by the other participants

What we ask of you as a NAMI national education program leader:

- Provide a safe and respectful environment for program participants
- Prepare for each class, presentation or support group meeting and conduct yourself, to the best of your ability, with courteous and respectful behavior
- Actively pursue maintaining your own wellness and respect your own emotional and physical resources and limitations
- Understand the difference between peer support and therapy and do not act in the capacity of a therapist or mental health professional. Offer only the services that you have been trained to provide and ask for assistance as needed.
- Respect the cultural differences of program participants
- Respect the privacy of program participants by creating an environment of confidentiality in the program setting and by holding in confidence sensitive, private and personal information. As a NAMI program leader, you must also be prepared to break confidentiality when you believe there is a danger of harm to a participant or others.
- Maintain appropriate boundaries by not engaging in romantic, physical or sexual relationships with participants in the NAMI program you are leading. Recognize that it is best practice for participants to attend a class or support group not led by someone with whom they are in a relationship, to avoid potential conflict and the discomfort of other participants.
- Refrain from promoting your own personal or spiritual beliefs
- Do not endorse/promote any individuals, groups or businesses in which you have a personal or financial interest
- Remain accountable for your own behavior and keep personal opinions and actions separate from those made as a representative of NAMI. Understand that your actions and behaviors reflect on the integrity of NAMI national education programs and impact the public perception of NAMI as an organization.

Presentation format

- The time frames and presentation format for NAMI programs must adhere to the options provided and not be altered in any way. The classes, presentations and support groups must be led by the number of trained leaders specified. The specific program presentations are described in **Table 1**.
- In NAMI classes (NAMI Basics, NAMI Family-to-Family, NAMI Homefront, NAMI Peer-to-Peer and NAMI Provider), no greater than a one-week hiatus may be taken for holidays which may occur during the course (e.g., Thanksgiving, spring break). More than a one-week break between classes creates too great a disruption in content presentation.

Table 1: Presentation formats

Program	Presentation format	Led/Taught by
NAMI Basics	Over a period of 6 consecutive weeks, one class per week; OR over a period of 3 consecutive weeks, 2 classes per week; OR across consecutive weekend days with no more than 2 classes taught on any one weekend	2 co-teachers
NAMI Connection	Groups meet once a week for 90 minutes	2 co-facilitators
NAMI Ending the Silence	Presentations given in 50 minutes	2 presenters
NAMI Family-to-Family	Over a period of 12 consecutive weeks, one class per week; OR over a period of 6 consecutive weeks, 2 classes per week; OR across consecutive weekend days with no more than 2 classes taught on any one weekend	2 co-teachers
NAMI Family Support Group	Groups meet at least once per month for 60-90 minutes	2 co-facilitators
NAMI Homefront	Over a period of 6 consecutive weeks, one class per week; OR over a period of 3 consecutive weeks, 2 classes per week; OR across consecutive weekend days with no more than 2 classes taught on any one weekend	2 co-teachers
NAMI In Our Own Voice	Presentations given in 60-90 minutes	2 presenters
NAMI Parents & Teachers as Allies	Presentations given in 60-120 minutes but shorter presentations may be provided	<u>Best Practice</u> : 3 presenters (1 educator, 1 parent, 1 young adult) <u>Alternate Option</u> : 2 presenters (1 parent, 1 young adult; either the parent or young adult must

		also qualify for the educator role)
NAMI Peer-to-Peer	Over a period of 10 consecutive weeks, one class per week; OR over a period of 5 consecutive weeks, 2 classes per week; OR across consecutive weekend days with no more than 2 classes taught on any one weekend	2 co-mentors, 1 assistant
NAMI Provider	Over a period of 5 consecutive weeks, one class per week; OR over a period of 5 consecutive days, 1 class per day; OR over a period of 2 consecutive weeks, 2 classes one week and 3 classes the other; OR over a period of 2 consecutive days, 2 classes one day and 3 classes the other day	<u>Best Practice</u> : 5 presenters (2 family members, 2 individuals with a mental health condition, 1 mental health professional) <u>Alternate Option</u> : 3 presenters (1 family member, 1 individual with a mental health condition, 1 mental health professional)
NAMI Provider Seminar	Seminar is given in 4 hours	3 presenters (1 family member, 1 individual with a mental health condition, 1 mental health professional)

Program fees

- Non-professional participants will not be charged a fee of any kind for enrolling and/or participating in any NAMI program
- NSO/NAs may charge professional organizations for offering the program to their audience, for example, NAMI Basics for professionals (social workers, case managers, etc.) or NAMI Provider (medical office staff, hospital staff)

Cultural adaptation and translation

- Any cultural adaptation or translation conducted on NAMI programs must be approved in advance and in writing by NAMI
- The procedures for requesting and securing permission can be found on the NAMI Education Helpdesk

Interpreting into a second language during a program

- Interpreting during a NAMI program is not recommended. The activity is distracting to the participants and program leaders. Consult with the NA or NSO about the availability of offering the program in the needed language.
- For trainings, consult with NAMI managers about the availability of certified trainers that can offer programs in the needed language

Research on NAMI programs

- Any research studies conducted on NAMI programs or using participants in NAMI programs must be approved in advance and in writing by NAMI

- The individual/institution conducting the research must share with NAMI the data, analysis and conclusions from the research project
- The Research Approval Request form can be found on the NAMI Education Helpdesk

Participation in NAMI Programs

Participant eligibility

- Only people who have the lived experience for a specific education program or support group meet the attendee qualifications to attend that program. These program-specific requirements are listed in **Table 2**. The exception is the NAMI Basics program, which may be offered in its entirety to groups of professionals only.
- Participation in NAMI presentation programs (NAMI In Our Own Voice and NAMI Parents & Teachers as Allies) is open to the general public
- Participation in NAMI Ending the Silence is open to youth ages 13-18 and to the general public (the target audience is youth ages 13-18)
- Professionals (mental health, school, day care workers, etc.) are not permitted to attend NAMI education programs or support groups unless they also meet the lived experience requirements of that specific program. The exception is the NAMI Basics program, which may be offered in its entirety to groups of professionals only.
- Observers are not permitted to attend or audit any NAMI class or support group

Table 2: Requirements to participate/attend

Program	Who is eligible to attend
NAMI Basics	Parents or other primary caregivers of an individual, 22 years of age or younger, who is experiencing mental health challenges
NAMI Connection	Any adult with a mental health condition, an official diagnosis is not required
NAMI Ending the Silence	Youth ages 13-18 and the general public
NAMI Family-to-Family	Any adult with a loved one affected by mental illness
NAMI Family Support Group	Any adult with a loved one affected by mental illness
NAMI Homefront	Any adult with a loved one who is a Service Member (active duty military or Veteran) experiencing a mental health challenge
NAMI In Our Own Voice	General public
NAMI Parents & Teachers as Allies	General public, although the target audience is school personnel

NAMI Peer-to-Peer	Any adult with a mental health condition, an official diagnosis is not required
NAMI Provider	Any adult who works with people with mental health conditions and/or their family members as a part of their job: mental health professionals, lay professionals, administrative staff, etc.
NAMI Provider Seminar	Any adult who works with people with mental health conditions and/or their family members as a part of their job: mental health professionals, lay professionals, administrative staff, etc.

American with Disabilities accommodations

- Under the Americans with Disabilities Act (ADA) accommodations must be made for participants who are deaf, hard of hearing or deaf-blind. Accommodations that are made, such as contracting with interpreters are the responsibility of the NSO or NA.
- Digital copies of participant manuals should be made available for those individuals that need large print versions. Copies may be downloaded from the NAMI Store. The device to read the manuals is the responsibility of the participant.

Program Leaders

Program leader qualifications

- All NAMI program leaders¹ must be NAMI members, meaning they are current in their annual dues and have a record in NAMI’s member management system
- All NAMI program leaders must be trained and certified by national or state trainers
- All NAMI program leaders must be at least 18 years of age
- Untrained individuals are not permitted to serve as teachers in a NAMI classes (NAMI Basics, NAMI Family-to-Family, NAMI Homefront, NAMI Peer-to-Peer and NAMI Provider). In cases where a teacher is unable to continue teaching the class, an untrained substitute may be appointed to help with lecturing. The substitute is not considered certified and will not be allowed to teach the class again until they participate in a regular teacher training workshop.
- Untrained individuals are not permitted to be substitutes in either the presentations or support groups
- Due to the investment of time and money to train volunteers, prospective NAMI program leaders are expected to meet outlined requirements of the NSO for the program for which they are training (e.g., teach a minimum of two course cycles for classes). It is understood that unexpected life situations may occur that will necessitate compassion and flexibility in this policy.

¹ Program leaders include NAMI teachers, mentors, presenters and facilitators.

- Existence of a criminal record does not preclude individuals from leading NAMI programs. The NSO/NA will review each situation on a case-by-case basis and may deny or limit those volunteer opportunities.
- Specific additional eligibility requirements for each NAMI program are listed by program in **Table 3**

Table 3: Qualifications for program leaders

Program	Program leader qualifications
NAMI Basics	Prospective teachers must be parents or other primary caregivers of a person who exhibited mental illness symptoms prior to age 13 (the formal diagnosis may have been made years later, but symptoms appeared prior to age 13). Ideally will have taken the NAMI Basics course, but this is not required to allow NAs to expand the program into underserved areas.
NAMI Connection	Prospective facilitators are adults in recovery with mental illness. There is no prerequisite that a prospective facilitator has taken NAMI Peer-to-Peer
NAMI Ending the Silence	Prospective presenters must meet one of the following descriptions: (1) young adult age 18-35 living with a mental illness in recovery (preferably who is also a NAMI In Our Own Voice or NAMI Parents & Teachers as Allies presenter); (2) adult who is either a family member or a person with a mental illness (preferably also a trained teacher/mentor for NAMI Basics, NAMI Family-to-Family, NAMI Homefront or NAMI Peer-to-Peer, or has taken one of these courses)
NAMI Family-to-Family	Prospective teachers must be family members (parents, siblings, adult children, spouses or partners) of a person with mental illness. Ideally will have taken the NAMI Family-to-Family course, but this is not required to allow NAs to expand the program into underserved areas.
NAMI Family Support Group	Prospective facilitators must be family members (parents, siblings, adult children, spouses or partners) of a person with mental illness. There is no prerequisite that a prospective facilitator has taken NAMI Basics, NAMI Family-to-Family or NAMI Homefront.
NAMI Homefront	Prospective teachers must be family members (parents, siblings, adult children, spouses or partners) of Service Members (active duty military or Veteran) who experienced mental health challenges. There is no prerequisite that a prospective teacher has taken NAMI Homefront.
NAMI In Our Own Voice	Prospective presenters are adults in recovery with mental illness
NAMI Parents & Teachers as Allies	Prospective presenters must meet one of the following descriptions: (1) young adult age 18-35 in recovery with a mental illness who experienced symptoms during their school years; (2) parent or primary caregiver of a person who exhibited symptoms of mental illness while in school (preferably the parent will be a teacher/mentor for or have taken either NAMI Basics, NAMI Family-to-Family, NAMI Homefront or NAMI Peer-to-Peer); (3) a school professional who also is either a family member of someone with a mental illness or lives with mental illness themselves

NAMI Peer-to-Peer	Prospective mentors and assistants are adults in recovery with mental illness
NAMI Provider	Prospective teachers must meet one of the following descriptions: (1) adult in recovery with a mental illness, preferably who is also a NAMI Peer-to-Peer mentor; (2) family member or partner of a person with mental illness, preferably who is also a NAMI Basics, NAMI Family-to-Family or NAMI Homefront teacher; (3) a mental health professional who also is either a family member of someone with a mental illness or lives with mental illness themselves
NAMI Provider Seminar	Must be certified as a NAMI Provider teacher

Mandated reporting

- For the purpose of NAMI programs, a “mandated reporter” is someone who because of other training they have received (e.g., Certified Peer Specialist) or a position they hold (e.g., mental health counselor) has been trained in their respective state’s laws around mandated reporting (e.g., suspected physical abuse, suspected harm to self or others)
- A NAMI program leader who also has the designation of being a mandated reporter in his or her state is required by NAMI to inform the participants in their class/support group of their status at the beginning of the class or at the start of each support group session, even if their specific mandated reporter regulations do not require this disclosure
- Participants in NAMI programs who are also mandated reporters should follow the requirements of their licensure and state, but are not required to inform participants of their presence
- A NAMI program leader who is not a mandated reporter in his or her state but who is concerned about something reported by a participant in their class/support group should discuss those concerns with the sponsoring NSO or NA and follow the policies and procedures of that organization, which must comply with the laws in that state

Compensation for program leaders

- It is imperative that all NSOs and NAs understand that any form of payment to program leaders (contract fees, stipends, etc.) may be considered as an employer/employee relationship. NSOs and NAs must be familiar with federal and state law regarding regulations on employees and contractors if they opt to provide payments of any sort to program leaders. Guidance on federal law can be found at www.irs.gov/businesses/small. On that page, click on the title **Independent Contractor (Self-Employed) or Employee**. Additional resources are available on the NAMI Education Helpdesk. Please consult resources in your state for laws specific to your state.
- NAMI neither requires nor recommends payment of any type for NAMI program leaders.

State Trainings

State trainer qualifications

- All prospective state trainers for NAMI programs must be NAMI members, meaning they are current in their annual dues and have a record in NAMI’s member management system
- All prospective state trainers for NAMI programs must be screened for readiness and then be recommended to attend a NAMI Training of Trainers event by their NSO (either by the executive director or the president of the board of directors). This recommendation indicates the NSO endorses not only that the individual meets the minimum requirements, but that they are at a point in their life where they are ready to become state trainers and will be able to perform in that new role.
- Eligibility of a state trainer to train may be reviewed and eligibility withdrawn at any time by the NSO or NAMI
- Program specific eligibility requirements to become a state trainer are detailed in **Table 4**

Table 4: Qualifications to become a state trainer

Program	State trainer qualifications
NAMI Basics	Must have taught 1 complete 6-session NAMI Basics course
NAMI Connection	Must have at least 6-12 months’ experience facilitating a NAMI Connection group, utilizing the NAMI Connection Recovery Support Group model
NAMI Ending the Silence	Must have given at least 5 NAMI Ending the Silence presentations
NAMI Family-to-Family	Must have taught 1 complete 12-session NAMI Family-to-Family course
NAMI Family Support Group	Must have at least 6-12 months’ experience facilitating a NAMI Family Support Group, utilizing the NAMI Family Support Group model
NAMI Homefront	Must have taught 1 complete 6-session NAMI Homefront course
NAMI In Our Own Voice	Must have given at least 5 NAMI In Our Own Voice presentations
NAMI Parents & Teachers as Allies	Must have provided at least 2 NAMI Parents & Teachers as Allies presentations.
NAMI Peer-to-Peer	Must have taught 1 complete 10-session NAMI Peer-to-Peer course
NAMI Provider & Provider Seminar	Must have taught 1 complete 5-session NAMI Provider Education course

State training procedures

- State training schedule, format and content may not be altered or condensed in any way. Specific formats and trainer requirements are described in **Table 5**.
- Not all trainees are guaranteed certification; certification will be decided upon by the state trainers based on the trainee's ability to demonstrate the skills required and to adhere to the program model. In cases where certification is not granted, the Non- and De-Certification Procedures should be followed to include documentation at all levels. The process for Non- and De-Certification can be found in the program trainer manual and on the NAMI Education Helpdesk.
- NSO or NAs who require an out-of-state trainer to hold a program training must contact the NAMI manager in the national office who oversees that program. The NAMI manager will identify certified trainers the NSO/NA may contact.
- All trainings must be reported to NAMI through the online data reporting system six weeks prior to the training. A link to the online data reporting system may be found on the NAMI Education Helpdesk.
- The NAMI state program director/coordinator must submit any documentation required for specific programs to NAMI after the training. This documentation is described in each of the NAMI program training manuals.

Table 5: State training formats

Program	Training format	Led/Taught by
NAMI Basics	Day 1 begins at 3 pm and Day 3 ends at noon, or training may be held in 2 full days	2 state trainers
NAMI Connection	2-day training workshop; states may use the 3-day model	1 state trainer for every 6 trainees plus the state coordinator or other designated staff member
NAMI Ending the Silence	One full day training workshop or one 2-hour online training. For both training formats, presenters will have an in-person practice session within 30 days of training.	2 state trainers
NAMI Family-to-Family	2.5-day training workshop	2 state trainers
NAMI Family Support Group	2-day training workshop; states may use the 3-day model	1 state trainer for every 6 trainees
NAMI Homefront	Day 1 begins at 3 pm and Day 3 ends at noon, or training may be held in 2 full days	2 state trainers
NAMI In Our Own Voice	2-day training workshop	2 state trainers plus the state coordinator or other designated staff member

NAMI Parents & Teachers as Allies	1 full day training workshop	1 state trainer
NAMI Peer-to-Peer	3-day training workshop	2 state trainers plus the state coordinator or other designated staff member
NAMI Provider & Seminar	1.5-day training workshop	1 state trainer

Compensation for state trainers

- It is the responsibility of NSOs and NAs to take into consideration all federal and state laws regarding employees and contractors as well as the budget amount available for this purpose
- NSOs and NAs are encouraged to contract with a state trainer for his or her services. NAMI realizes funds may not always be available, but suggests that each state trainer receive a minimum amount of \$250 per training given, with the possibility of up to \$500 when funding is available. For online trainings, it is suggested that each trainer receive a minimum of \$50.
- State trainers shall be offered accommodations the night before and nights during trainings when travel is required
- Trainers should be reimbursed for all travel expenses, including any travel and meals. Reimbursement should be for the actual expenses only
- If a state trainer from one state agrees to train in another state, the trainer should receive the going rate established by the state hosting the training