NAMI's

Web Governance Handbook

Updated 12/14

NAMI's WEBSITE MISSION STATEMENT

NAMI.org will advance the NAMI movement by recruiting and motivating supporters and ambassadors to:

- educate themselves and others about mental illness and recovery
- find and access support
- contribute by donating, walking, engaging, joining
- take action by advocating, participating, volunteering and sharing their stories

Welcome to NAMI Web Governance for our new website. Governance is a key component to keeping a site clutter-free and effective—that means helping users get where they need go and ensuring NAMI reaches our own goals at the same time.

As of Q4 2014, nami.org gets nearly 1 million unique visits a month. Our homepage gets almost 240K visitors a month. We have more than 20K Twitter followers, 240 Instagram followers and 160K likes on Facebook (FB). That's a big community! NAMI's website belongs to all of us. Although quarterbacked by communications (comm) and information technology (IT), all staff members are responsible for NAMI's web content and the site is representative of everybody's work.

How We Got Here

NAMI collaborated with expert vendors, NAMI staff and stakeholders to establish our identity on the web for the public-facing world. As an organization, we decided who we wanted to be, what we wanted to achieve online and how we would be successful in doing that through a deep web strategy, finely tuned IA (information architecture) and UX (user experience), web personas (user profiles), the refinement of NAMI's voice and tone and analytics deployment.

Our medical director, director of program content integrity and communications director worked heavily on initial taxonomy (key words and tags) to ensure that topic areas instrumental to NAMI's core pillars and strategic plan were addressed. This early taxonomy fed much of the learn section of the site map and information architecture we see today.

With the new site, we moved from a department- and topic-focused architecture to a user-based architecture. Another key component to streamlining the public site was moving internal NAMI content (for staff, members and leaders) to the extranet.

What Does That Really Mean?

Well, for starters, we created personae (models of our web users) and identified their wants and needs. Then we mapped out the paths they'd take on our site to get their needs met. Our navigation reflects these user paths.

NAMI identified 4 personae for the website (more to come in subsequent phase launches). These include:

- NAMI Classic (caregiver/parent
- Individual Living With MI
- Crusader/Nurturer
- Donor

NAMI.org PERSONAE


NAMI CLASSIC
(sub: NAMI MAMI)

Bio: Parent of a newly diagnosed child or long-term caregiver of adult child living with MI.

Motivators: Finding support for child, informing self about treatment, system and care options. Needs peer support for self.

User Path: Find support/local/programs; Get Involved/Join NAMI; Learn more/illness/discuss

Wireframe conversions:
- Donate (donate button) (footer)
- Join (join button) (footer)
- Take Class (Find support/programs...Find your local NAMI/programs...megafooter)
- Discuss (Register/communitiy/message board... Follow us on FB...FB share)
- Register, convention (megafooter, hero image, Get Involved)
- YANA (Hp feed...get involved)
- FInd local NAMI (HP, FS)


Individual with MI
(sub: Student/YA)

Bio: YA or adult living with MI at various points on life cycle

Motivators: Learning more about illness, connecting with others, finding support (online, local), learning about managing relationships, work, school, needs help advocating for self and navigating system

User Path: Learn more (illness), Find Support, Ed. Programs or NOC

Wireframe conversions:
- Find/start NOC or P2P (megafooter, NAMI programs...Find support/I am/individ)
- Join (join button)
- Discuss (Register/communitiy/message board... Follow us on FB...FB share)
- YANA (Hp feed...get involved)
- P2P fundraise/pledge (GI/CPDJ...footer)
- Register, sub and submit interests (Reg/join button/mynami)
- Live chat/HL (FS...utility nav...pop up)
- Event (walk, convention) (GI/footer/hero)
- Print and/or pull up CPNP med info on phone (LM, Treatment, meds)
- Find local NAMI (HP, FS)


Crusader/Nurturer

Bio: Friend of ILWMI

Motivators: Fighting stigma, changing policy, improving community supports, social presence

User Path: Learn more (illness), Get Involved, Advocacy portal, DIY

Wireframe conversions:
- Volunteer (GI)
- Join (join button)
- Discuss (Register/communitiy/message board... Follow us on FB...FB share)
- P2P fundraise/pledge (GI/CPDJ...footer)
- Register, sub and submit interests (Reg/join button/mynami)
- Event (walk) (GI/footer/hero)
- Print and/or pull up CPNP med info on phone (LM, Treatment, meds)
- Pledge/campaign (GI, PP)
- YANA, read only (HP)


Major Donor
(sub: individual donor)

Bio: Family member or community leader who wants to support NAMI for its efforts, believes in cause and/or needs to be sold on charity

Motivators: Needs proof of NAMI efforts, wants to support community or fight on larger scale, but no interest or time for small-scale advocacy

User Path: YANA, programs, about NAMI

Wireframe conversions:
- Obtain financials/structure/AR (about us)
- YANA (read only)
- Where we stand (about us/newsroom/footer)
- Register, sub and submit interests (Reg/join button/mynami)
- Donate (GI/button)
- DIY funraising (ID only, GI)

NAMI.org focuses on the user's needs and 3 main motivators of our users: to learn about mental illness and policy, live and get involved. User paths along these three major navigation categories (also called "level one nav") set the stage for how the site is organized.

The communications functions of the website (including design, content, messaging, marketing, community engagement, campaigns and engagement measurement) are determined by the objectives of the strategic plan, are directed by the comm team and then implemented in partnership with other teams. For 2015, this means we'll be focusing a lot on making NAMI younger, leveraging technology, increasing awareness and strengthening our organization financially with individual donors.

KEY STAFFING: ROLES & RESPONSIBILITIES

It will take a village to run our new website and keep it effective. All of us will be planning, strategizing, writing and creating for the website. To keep content groomed and make sure it's performing, quarterly review and planning meetings will be held to discuss and schedule website initiatives, projects and content.

Each department at NAMI has designated Web Officers who are trained to post and manage their own content areas, as well as the content of their teams. Quality Assurance (QA) teams comprised of staff members will help review, maintain and ensure our web content meets standards—together.

TEAM	FUNCTION	STAFF
Lead Content Approvers (LCA)	Manages quarterly web content review meetings, works with staff to execute web content direction, web special sections, manages evolution of strategy/IA.	Courtney Reyers Brenan McLean
Web Officers	Manage daily posting of content by department; responsible for following content/governance guidelines.	At least 1 staff member from every department
Extranet Management Team	Oversee posting and quality of NAMI extranet.	Liz Norton Courtney Reyers
Quality Assurance Teams	Review web content sections to ensure they meet standards.	Teams of 3, various staff
Analytics	Responsible for executing web metrics, dashboards. Monitoring of data to help inform executive team of trends. Responsible for monitoring data to apply metrics to lifecycle and content value.	Courtney Reyers Don Lamm Brendan McLean Nathan Lemon

TEAM	FUNCTION	STAFF
IT Team	Responsible for technical maintenance and upgrades of AMS and CMS.	CIO Don Lamm Liz Norton Nathan Lemon
Comm Team	Responsible for all NAMI content/writing, content strategy, editorial style, branding social media, marketing.	Katrina Gay Bob Carolla Courtney Reyers Brendan McLean Joni Agronin
Training	Coordinate CMS, AMS and content trainings as necessary. Conduct in-house trainings as needed on web CMS, other web tools, writing for web.	Don Lam Liz Norton Courtney Reyers Brendan McLean
Appeals Committee	Handles all web governance challenges from the LCA; helps inform the LCA of web initiatives from strat plan.	Mary Giliberti Katrina Gay David Levy COO CIO

CONTENT: CREATION & POLICIES

Content goals for the website are determined by the Strategic Plan, overseen by the comm team and executed by staff.

NAMI's web content has a fresher, more casual voice than you might see in our more technical, policy-driven materials or Ken's medical writing style. It's important we keep this voice and tone on the website to make NAMI younger and become more accessible to different audiences.

All web content is approved by the comm team, but Web officers are able to approve their own content—as well as the content of their team members—once they demonstrate core competency in the NAMI tone and voice and style guide and posting in our CMS, Kentico.

TYPES OF CONTENT

When we say content, we mean 7 types of content:

1. Article/blog (written web content)
2. Content sections (written web content)
3. Images/photos
4. Infographics
5. Printed materials/publications
6. Social Media
7. Video

ARTICLES

An article is a general piece of web content (general news story, book review or research summary. Most of what NAMI staff writes is this kind of content. The posting and publishing of articles is allowed by any web officer or content creator with publishing rights.

BLOGS

Blogs are written by specific authors, and can be less strict about the NAMI tone and voice, as they are written in the author's tone and voice. Blogs are meant to be more opinion pieces (think op-eds, personal experiences, author's areas of expertise) and less "news-like." Blogs can be posted (submitted in the back end) by anyone, and published (actually appear on the website) by web officers, LCAs or content creators with publishing rights.

CONTENT SECTIONS

Content sections are areas of our site that span a topic or initiative—think the depression section or MIAW resource area. Adding pages to existing sections or creating new ones require extensive planning, UX and IA thinking and careful execution. See the chart for content creation on page 8. Content sections are approved by the LCA and built out by the comm and IT teams. Once defined, anyone with publishing rights on the project can post content.

IMAGES/PHOTOS

Coming soon.

INFOGRAPHICS

Coming soon.

PRINTED MATERIALS & PUBLICATIONS

Most of NAMI's publications are handled by the comm team (think Advocate, brochures, annual report). Teams who oversee other publications (such as education, MAC and development) work with the comm team on scheduling, design, content, etc. ALL NAMI publications must meet style guidelines and be approved by the comm team as well as NAMI's executive director before going to print.

Printing bids and design needs should go through Office Services and Communications.

Marketing collateral must contain the most updated and correct NAMI boilerplate and statistics for mental health. Marketing materials must be approved by the director of communications.

SOCIAL MEDIA

NAMI has a Twitter (@NAMICommunicate) and Facebook page, where we post links, make announcements and connect with users. We also have an Instagram account at NAMICommunicate.

Twitter and Facebook posts are conversational and informative. We don't always know what everyone is doing, but everyone outside our office does want to know if they can participate! Make sure to build our social networks into your content plans and marketing efforts. Collaborate with the comm team on the best approach for this.

Why we do it: To engage our growing FB and Twitter ecosystems and bring them into the NAMI fold—even if they never come to the website.

VIDEO

Coming soon.

POSTING, PUBLISHING & APPROVING CONTENT

Posting a blog or a news article to an existing section of the home page or adding media to an existing section will require approval by the LCA until content creators are granted web officer status. Web officer status is achieved when a content creator successfully demonstrates both voice/tone/style guideline adherence and Kentico training skills, which result in 3 successive posts. Web officers can post and publish/approve content for any content creators on his or her team, with the knowledge that he/she is responsible for meeting quality standards. Web officers and other content creators are required to use the QA checklist to help ensure content meets standard.

NEW CONTENT SECTIONS & SITE CHANGES

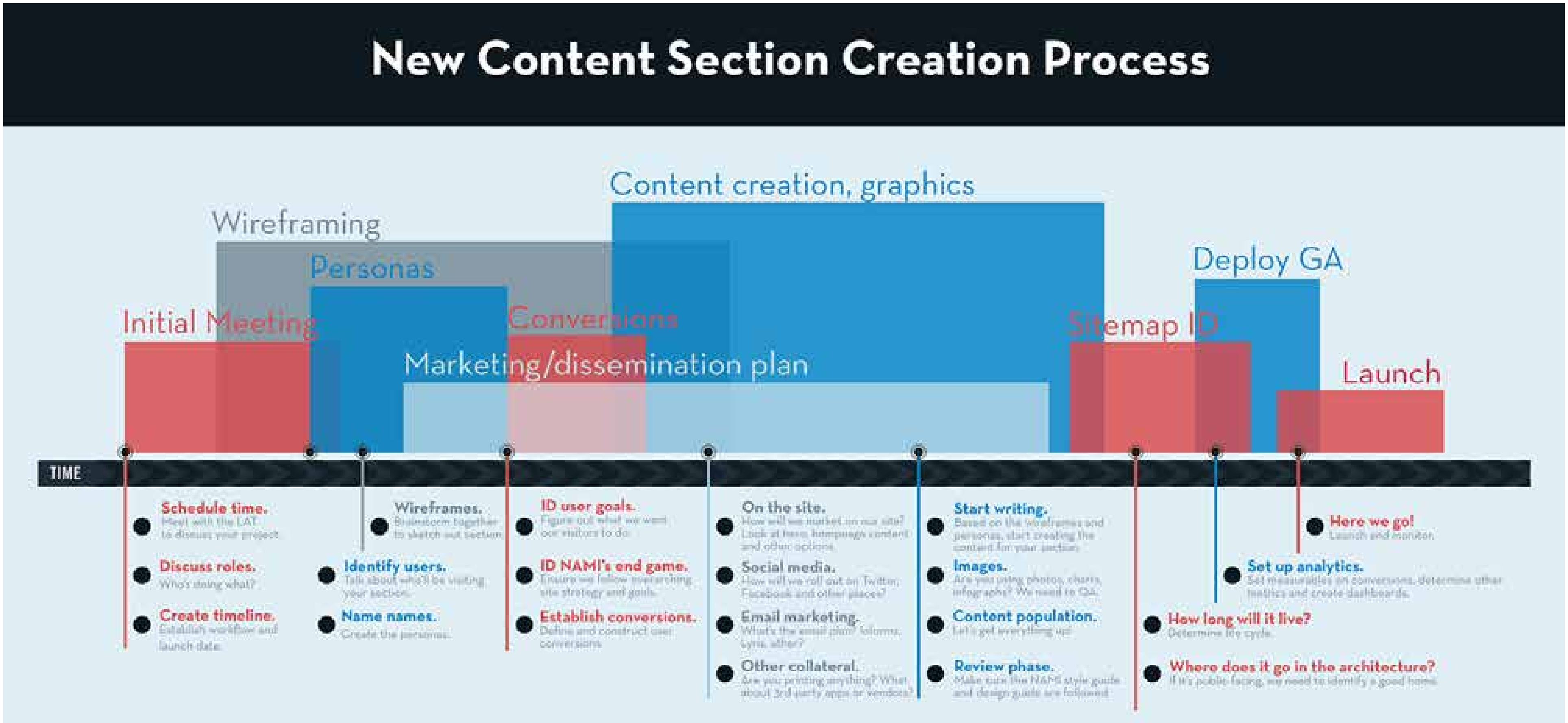
Changes to the homepage and main website navigation will be created with the LCA. Proposed top-level changes need to be requested before or during quarterly planning meetings to ensure staffing and resource allocation in support of a successful outcome.

Staff will be encouraged to announce their production needs and plans either via email to the LCA team before, or in person at, quarterly content review meetings to ensure conversions and personas are met, to help inform and ensure a social media and marketing strategy and to ensure that analytics are set up.

Some special and seasonal content—NMMHAM, MIAW, MHM, election-themed sections, etc.—are expected and should be executed in the same style as a new content section until we have them down pat.

When a new website section is requested or required, teams will need to schedule time with comm and the LCA. Deadlines, "mini" IA, personas, marketing strategy and build-outs need to be strategized and executed as a group and obtain IT team and appeals committee approval. Requests for major changes to the top-level navigation and/or homepage must be cleared by the LCA.

New content planning, illustrated in the diagram on the next page, is a fun, creative process where we get to collaborate on personas, IA and user paths. Together, we get to strategize and execute new areas of the website and make sure they're effective. Social media, email and other marketing efforts will also be a part of the bigger plan.


New Content Section Creation Process
Content creation, graphics
Wireframing
Personas
Deploy GA
Initial Meeting
Conversions
Sitemap ID
Marketing/dissemination plan
Launch
TIME
Schedule time.
Meet with the LAT to discuss your project.
Discuss roles.
Who's doing what?
Create timeline.
Establish workflow and launch date.
Wireframes.
Brainstorm together to sketch out section.
Identify users.
Talk about who'll be visiting your section.
Name names.
Create the personas.
ID user goals.
Figure out what we want our visitors to do.
ID NAMI's end game.
Ensure we follow overarching site strategy and goals.
Establish conversions.
Define and construct user conversions.
On the site.
How will we market on our site? Look at hero, homepage content and other options.
Social media.
How will we roll out on Twitter, Facebook and other places?
Email marketing.
What's the email plan? Inform, sync, other?
Other collateral.
Are you printing anything? What about 3rd party apps or vendors?
Start writing.
Based on the wireframes and personas, start creating the content for your section.
Images.
Are you using photos, charts, infographs? We need to QA.
Content population.
Let's get everything up!
Review phase.
Make sure the NAMI style guide and design guide are followed.
Here we go!
Launch and monitor.
Set up analytics.
Set measurables on conversions, determine other metrics and create dashboards.
How long will it live?
Determine life cycle.
Where does it go in the architecture?
If it's public-facing, we need to identify a good home.

CONTENT REQUEST FORM

The new content request form is used to request new sections or pages on the site. This form helps you think through all the areas that need to go into making quality content with successful outcomes.

Today's date:

Overview:

Who is your MAIN audience?
❏ NAMI leaders/field (Extranet / Internal)
❏ American public (web user)

Persona:
❏ Individual with MI
❏ Caregiver/family member
❏ Donor
❏ Advocate/Crusader
❏ New/other (please indicate):

Is this project funded? Yes No

Deadline:

Has timeline been spec'ed out with IT and comm teams? Yes No

Has cost been spec'ed? Yes No

Do you have the budget? Yes No

Do you have a marketing plan? Yes No

Have personas been developed? Yes No

Has user testing/metrics been analyzed? Yes No

Have you done a wireframe? Yes No

Have you mapped out conversions? Yes No

Expected outcome:

QA CHECKLIST

Use this form when writing, posting and reviewing web content.

Your Name:

Section reviewed:

URL:

❏ Content meets editorial guidelines (see style guide-rank 1-10, 10 being best):

Friendly tone and plain language.	1 2 3 4 5 6 7 8 9 10
Phone numbers in correct format.	1 2 3 4 5 6 7 8 9 10
All numbers are in numeric format.	1 2 3 4 5 6 7 8 9 10
No double spaces after punctuation.	1 2 3 4 5 6 7 8 9 10
Use the % instead of percent.	1 2 3 4 5 6 7 8 9 10
Em dashes are correct.	1 2 3 4 5 6 7 8 9 10

❏ Content is “chunkable” (easy to read, small paragraphs, bullet points where appropriate).
1 2 3 4 5 6 7 8 9 10

There is a clear persona identified with this section/piece of content. ❏ Y ❏ N

❏ There are clear conversion points (sign up for a class, watch a video) and they are noted in the content worksheet. ❏ Y ❏ N

❏ Any statistics are correct, up-to-date and consistent across the site. As a rule, we follow the statistic published by NIMH. ❏ Y ❏ N

❏ The content is tagged correctly—and with no more than 5 tags. ❏ Y ❏ N

❏ News and blog articles have grabby headers with correct capitalization. ❏ Y ❏ N

❏ The content has a clear, lay-friendly **summary** that also helps with SEO.
1 2 3 4 5 6 7 8 9 10

❏ Content has correct publish and delete dates for appropriate content type.
❏ Y ❏ N

❏ Analytics are set up for this page. ❏ Y ❏ N

Final outcome:
❏ I suggest author rewrite or correct content so it meets standards (red light)
❏ I made the changes and published corrected content (green light)
❏ This content needs to be discussed at a meeting (yellow light)

SOCIAL MEDIA REQUEST FORM

Use this form as a guide while you build your campaign, report or major project. This will help us work together to build a plan for effective release and promotion of your content.

Today's date:
Start date:
End date:
Staff contact:

Objective:

Goals:

Strategies:

Outcomes:

Who is your MAIN audience?

Persona:
❏ Individual with MI
❏ Caregiver/family member
❏ Donor
❏ Advocate/Crusader
❏ New/other (please indicate):

Content Expectations/Checklist:
❏ Facebook posts (how many? how often?)
❏ Images/graphics/memes
❏ Video/YouTube
❏ Tweets (how many? how often?)
❏ Blog/Article for NAMI.org (topic: date:)
❏ Web page URL on NAMI.org of related content
❏ Hashtags:
❏ Key stakeholder @Handles?
❏ Other:

Glossary

AMS: NAMI 360

NAMI's Association Management Software is Avectra NetForum, also known as NAMI 360. NAMI 360 acts as the central repository for information on individuals and organizations associated with NAMI, including NAMI State Organizations and NAMI Affiliates. NAMI 360 acts as the official database of record for all NAMI memberships. All donations (with the exception of legacy Personal Fundraising pages) are also processed via NAMI 360. The CRM Senior System Manager acts as the curator of all maintenance work, new work and software updates for Avectra NetForum.

CLOUD HOSTING

Cloud hosting is a service which provides full service hosting and maintenance for NAMI web services. This means NAMI does not have purchase servers and other hardware, but rather pays a fee for a hosting in the cloud. The new NAMI web site will be hosted on Microsoft's Azure platform.

CMS: KENTICO

A content management system is computer software that allows non-technical users to update and maintain a web site. NAMI has selected Kentico as our content management system. Kentico provides a wide range of features and is very easy to use, both for developers and content contributors.

We are using the KenticoPlus licenses, which is cloud license and allows us to have unlimited upgrades. For this we pay a monthly fee, rather than a one-time or annual license. We are using Kentico 7 at present, but will upgrade to Kentico 8 once we have launched and stabilized the new website.

DESIGN STYLEGUIDE & STYLE SHEETS

See the web style guide at www.nami.org/identity. (Coming soon).

EMAIL

NAMI uses 4 types of email interfaces to communicate with our members and supporters.

1. Office 365 Email: NAMI's email servers for staff email. This system is to be used for inter-office emails, informal communications and other NAMI business. It is not appropriate for large blasts or for sending emails with HTML or other formats. Emails sent through this system are not captured or tracked in NAMI 360. This system is maintained by IT.

2. Lyris: Lyris is our mail group system. Lyris is used to send messages to listservs, office lists such as allstaff and smaller newsletters within the organization and field. Lyris mailings are not tracked by NAMI 360.

3. Kentico Mail System (SMTP): The NAMI website sends administrative emails such as confirmations, content updates and reminders. These emails are sent via the webserver and are managed by the Web team.

4. Informz: Informz is used for bulk mailings, such as solicitations and large newsletters. Informz emails are paid "by the email" and require coordination with the Web team and comm to design, write and target Informz emails. Informz emails are tracked in NAMI 360. Informz emails are managed by the comm team.

EXTRANET

The Extranet is a portion of NAMI's website devoted exclusively to NAMI leaders. NAMI leaders include executive directors, board members, class teachers and trainers, program directors, NAMI on Campus leaders, NAMI State Organizations and NAMI Affiliates and many more. The goal of the Extranet is to house any information a NAMI leader needs to run a NAMI program or organization in one location for ease of use. Access to the Extranet is controlled by a series of roles governed by data in NAMI 360. For example, if a user is on the NAMI Board of Directors in NAMI 360, they would have access to the NAMI Board of Directors section of the Extranet. User information must be logged in to NAMI 360 for a user to be granted appropriate Extranet access.

GOOGLE ANALYTICS/METRICS

Analytics and social media metrics (engagements such as likes, retweets, shares) tell us what topics are hot with our readers and users. Likewise, user/reader surveys, done yearly, inform our thinking on what readers want.

On nami.org, in addition to analytics, we'll have a polling capability that allows users to tell us in real-time what they like and don't like. This information will be shared quarterly or as needed with staff and will inform our thinking and help us serve them better—and attract larger audiences.

Implications on governance

Metrics will be the largest cornerstone of NAMI web governance, determining high- and low-performing content, informing us on what topic areas resonate with our audience, if our marketing was effective, if the "donate" button is in the right place, etc. With analytics, you don't have to guess if your content is working anymore, you can get real-time data showing you results.

Google Analytics (GA), which is free, is the main metrics tool NAMI uses. Web officers and key stakeholders will have GA dashboards that will tell them if their efforts are effective or not, and help them fine-tune their content accordingly.

In addition, NAMI keeps tabs on its social media analytics on FB, Twitter and Tumblr, among other platforms. These metrics all add up to a bigger picture of what content works, and what doesn't. Large picture analytics will be incorporated into the comm team quarterly report dashboard and distributed to all staff. In addition, the dashboard will be aligned with the business plan to support meaningful outcome measures, as indicated from the plan.

SEARCH & SEO

On NAMI.org, we have deployed faceted search, which allows users to sort their searched keyword results by content types and other taxonomy strategies. (insert screenshot)

TAXONOMY

See our taxonomy list at www.nami.org/identity. (coming soon)

APPEALS FORM

We expect everything to run smoothly as we populate the NAMI website. In rare cases, things may have to go to review to the Appeals Committee if a rare content request does not meet governance standards or process.

Use this form when the lead approval team, IT or comm rejects your request and you want to appeal it with the appeals committee.

Today's date:

Overview:

Reason for initial rejection:

Who is your MAIN audience?
❏ NAMI leaders/field (Extranet / Internal) ❏ American public (web user)

Persona:
❏ Individual with MI ❏ Caregiver/family member
❏ Donor ❏ Advocate/Crusader
❏ New/other (please indicate):

Is this project funded? Yes No

Deadline:

Has timeline been spec'ed out with IT and comm teams? Yes No

Has cost been spec'ed? Yes No

Do you have the budget? Yes No

Do you have a marketing plan? Yes No

Have personas been developed? Yes No

Has user testing/metrics been analyzed? Yes No

Have you done a wireframe? Yes No

Have you mapped out conversions? Yes No

Expected outcome: