Mental Health FIRST AID

from NATIONAL COUNCIL FOR MENTAL WELLBEING



Communitywide Mental Health First Aid Implementation Road Map

A Road Map for guiding organizations in sustainable Mental Health First Aid implementation to improve communitywide mental health knowledge, behavior and outcomes.

Acknowledgments

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Introduction

Mental Health First Aid (MHFA) is a training that equips individuals with the skills to recognize, understand and respond to signs of mental health and substance use challenges or crises. Since its introduction to the U.S. by the National Council for Mental Wellbeing in 2008, over 4.5 million First Aiders have been trained across all 50 states and U.S. territories. While many organizations offer MHFA as a short-term program, some take a more strategic approach by setting long-term goals, building capacity for larger scale implementation, forming community partnerships and developing sustainable plans to engage entire populations. We call this approach communitywide MHFA implementation, meant to maximize the training's impact by strengthening support networks and promoting lasting community mental health.

Creating mentally healthy communities MHFA

MHFA is an evidence-based training that empowers communities and organizations to help respond to someone experiencing a mental health and substance use challenge or crisis. It encourages early intervention and reduces stigma. The training enhances mental health literacy, helping learners identify both professional and self-help resources while building the confidence and empathy needed to support those in distress. Through these efforts, MHFA strengthens community support networks and helps connect people to care. For more information on MHFA research and its application in the U.S., visit the MHFA website.

While MHFA is a powerful tool for raising awareness and providing initial support, it is not a substitute for professional care. It is designed to help individuals identify people in distress and connect them with the appropriate resources, but it does not address complex conditions or long-term treatment needs.

It's crucial to define the MHFA implementation purpose and priorities in your community:

- **Priorities:** What specific needs or challenges are you aiming to address? What are the most common mental health concerns in your community?
- **Purpose:** Why is this initiative important for your community? How will MHFA address the identified challenges?

Why communitywide implementation?

Communitywide MHFA implementation encourages systematic integration of MHFA across districts, cities, counties or regions through cross-sector partnerships with governments, businesses and organizations. Grounded in the collective impact model, this approach unites different stakeholders around shared goals, fostering collaboration and strengthening networks of MHFA Instructors and champions (i.e., community leaders who advocate for MHFA and encourage engagement). By embedding MHFA into everyday life and institutions, communities can create a more cohesive, accessible and supportive mental health network, ultimately enhancing their wellbeing (Castillo et al., 2019).

Communitywide implementation:

- Creates sustainable, lasting change and community impact.
- Develops a community-informed plan that includes stigma reduction, outreach programs, and policy changes that address broader societal factors impacting mental health.
- Engages community leaders and organizations to collaboratively identify needs and develop solutions.
- Ensures MHFA is introduced or expanded strategically, systematically and measurably.
- Reaches different populations across entire communities.

For successful implementation, it's important to first identify the specific needs you wish to address. Consider whether the following outcomes align with your community's needs:

- Improving mental health literacy.
- Boosting confidence and self-efficacy.
- Increasing the likelihood of assisting individuals in distress.
- Reducing stigma and fostering empathy for those with mental health challenges.

Scaling MHFA in a sustainable and impactful way requires addressing several challenges. These include Instructor shortages, lack of leadership buy-in, funding constraints, lack of representation of different demographics and geographic locations, and volunteer burnout due to insufficient support. A one-size-fits-all approach is ineffective, as attitudes and available resources vary widely across communities. Furthermore, the abundance of mental health programs can make it difficult for stakeholders to prioritize MHFA, which may dilute attention and resources. Inconsistent data collection and monitoring also hinder the ability to measure the impact and refine strategies effectively.

To overcome these barriers, organizations must build strong support networks, clearly communicate the value of MHFA and demonstrate its impact to encourage stakeholder buy-in. Strategic partnerships, coalition-led planning and resource-sharing are key to scaling MHFA effectively and sustainably.

The Road Map

We created the Communitywide MHFA Implementation Road Map to support organizations like yours that are looking to expand MHFA's reach in your communities. Partnering with the Michigan Public Health Institute, we conducted focus groups, surveys and interviews with organizations implementing MHFA on a communitywide level to learn more about their successes and challenges. Those key findings, paired with evidence-based implementation practices for community mental health programming, form the foundation for this Road Map's guidance.

The Road Map provides information, resources and tools to guide communitywide MHFA implementation by building a comprehensive plan grounded in evidence-based principles. Each section includes key considerations for the implementation process, tips for sustainability, reflection questions and tools to get you started. The Road Map is meant to be used by a group of organizations and community leaders acting as the central coordinator or facilitator for implementing MHFA through a cohesive and coordinated systemwide approach. The Core Principles in this document center on enhancing collaboration between local government organizations, MHFA Instructors, corporate partners, sponsors, champions and community members to scale MHFA implementation effectively and sustainably within a community.

Coming Soon: Teen MHFA Communitywide Road Map

Additional guidance specific to implementing Teen Mental Health First Aid (Teen MHFA) is currently in development. A forthcoming Teen MHFA Best Practices Road Map will provide more tailored recommendations, implementation considerations, and practical strategies to support communities and organizations in delivering Teen MHFA effectively and sustainably.

When expanding MHFA initiatives at a communitywide level, there are two key teams often playing distinct but complementary roles:

1. A Steering Committee is a cross-sector group providing strategic oversight, governance and sustainability for your MHFA initiative. Members may include MHFA program directors, local government representatives, community leaders, corporate partners, sponsors and mental health champions. These groups may also be referred to as alliances, coalitions or work groups in other communities.
2. A MHFA Program Team executes MHFA initiatives, ensuring alignment with the Steering Committee's strategies. Members may include MHFA program leads, Instructors, Coordinators, and monitoring and evaluation leads. In some instances, MHFA Program Team members could also be part of the Steering Committee. Mental Health First Aiders play an important role in extending the program's impact in the community, so they should also be engaged as part of the broader team.

We'll refer to these two teams throughout the road map as the Steering Committee leads the initial strategy and the MHFA Program Team creates and carries out the action plan.

The Capacity Planning Tool

We have developed a fillable companion resource called the Capacity Planning Tool to help you assess your readiness to implement or expand your MHFA initiative using the communitywide framework.

The tool evaluates key factors such as organizational capacity, resources, culture and potential risks, helping identify strengths, gaps and opportunities for improvement before implementation. It is designed as an internal baseline assessment — not a grading tool — and information collected does not need to be shared externally. By highlighting areas of readiness and focus, the tool supports informed decision-making and sustainable MHFA implementation. It includes examples of capacity-building activities aligned with each core principle, reflection questions to guide discussion and space to document insights and next steps.

The Road Map and the Capacity Planning Tool are designed to be used together to maximize impact. As you review each core principle in the Road Map, use the Capacity Planning Tool to assess your readiness and see how you can prepare for the following areas of implementation:

- **Conduct a community assessment.**
  Assess community needs and priorities and identify existing resources and partnerships to inform planning.
- **Foster community collaboration.**
  Build cross-sector partnerships, engage community champions and establish or align with a Steering Committee to guide the initiative.
- **Develop a strategic plan.**
  Create a shared vision, identify opportunities and barriers and develop a coordinated plan to expand MHFA across the community.
- **Ensure your initiative can operate long term.**
  Establish a MHFA Program Team, develop an action plan, and coordinate training, outreach and engagement efforts.
- **Monitor and evaluate progress.**
  Define evaluation goals, identify key metrics, collect data and track outcomes to measure impact and guide improvements.
- **Plan for sustainable funding strategies.**
  Identify funding leads, explore different financial sources and develop strategies to support long-term MHFA implementation.

The core principle sections will guide you through best practices and key activities for a successful communitywide approach.

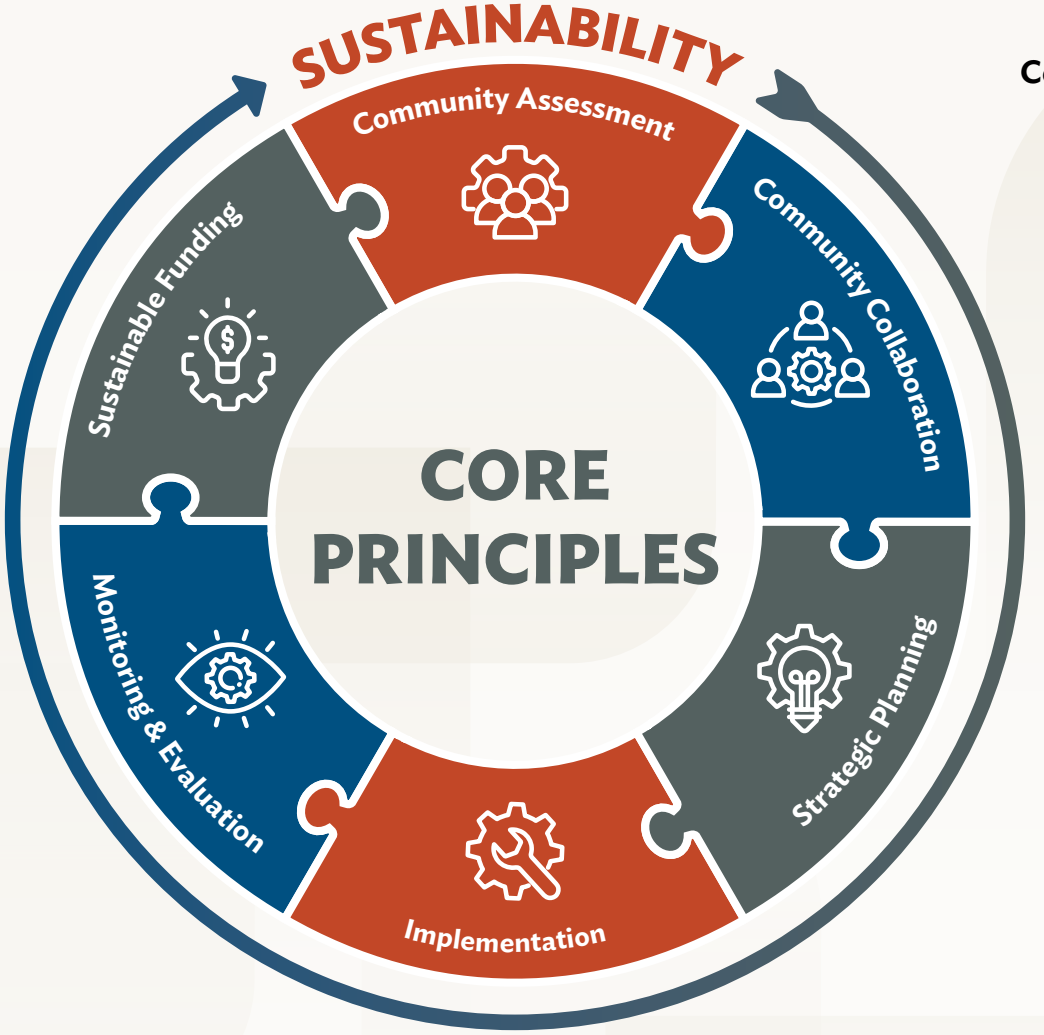


Figure 1: Core Principles for Success

Core principles for success

The Communitywide MHFA Implementation Road Map guides organizations through six essential core principles for success. These were identified based on the focus group and survey feedback from more than 100 individuals involved in MHFA implementation.

Figure 1 shows the six core principles in a circle surrounded by sustainability, representing its importance throughout the process.

Designed to be flexible and nonlinear, the Road Map allows each organization, coalition or community to tailor MHFA implementation based on its unique profile and readiness to expand reach. Although the Road Map sections are arranged in a specific sequence, organizations are encouraged to navigate between them in whichever way best suits their unique needs. Organizations can begin with the core principle that aligns most closely with their immediate priorities or circumstances and can then move between the other principles.

The following chart outlines the key activities for each core principle. Please take some time to review it and ensure that your organization is fully prepared to implement the fundamental steps for each principle before beginning your communitywide MHFA implementation. This will help set a strong foundation for success.

Core Principle	Key Activities	Responsible
Community Assessment	• Assess community needs and priorities. • Identify existing resources and partnerships. • Use assessment findings for planning.	**Lead Organization or Steering Committee** *(if already established)*
Community Collaboration	• Build cross-sector partnerships through storytelling. • Engage in future mapping. • Identify and engage champions. • Establish a Steering Committee.	**Lead Organization** **Steering Committee**
Strategic Planning	• Create a shared vision. • Identify opportunities and barriers. • Develop a sustainable operational plan. • Build a sustainable initiative.	**Steering Committee**
Implementation	• Establish a MHFA Program Team. • Develop an action plan. • Ensure sustainability.	**MHFA Program Team**
Monitoring and Evaluation	• Create a shared evaluation plan. • Develop key evaluation questions and identify key metrics of interest. • Identify data-collection methods. • Monitor and report outcomes.	**MHFA Program Team**
Sustainable Funding	• Designate dedicated funding leads. • Identify and diversify funding sources.	**Steering Committee** **MHFA Program Team**

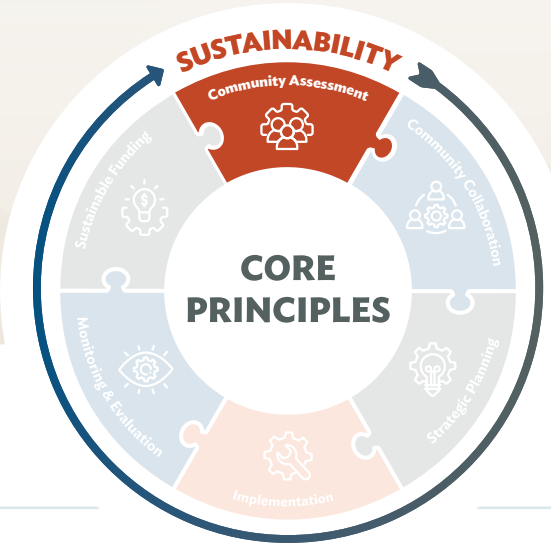
The six core principles are explored in detail throughout the Road Map with essential considerations and real-world examples for practical insights on how organizations have implemented key activities in their initiatives. Reviewing and understanding each of these will help your organization get started on its journey toward successful MHFA implementation.

Understanding Limitations

It is important to highlight that this Road Map is an evolving framework for communitywide MHFA implementation. Every organization's journey and the challenges they experience along the way will differ as they:

- **Develop a tailored approach for their community:** Given the unique needs and resources of each community, it's important to customize implementation strategies. Engaging local community partners ensures the approach is relevant and effective.
- **Create a Steering Committee:** Aligning different community partners and forming a dedicated Steering Committee for your communitywide MHFA initiative can be challenging due to varying priorities and conflicting agendas. To overcome this, it is helpful to establish a shared vision, leverage champions, use collaboration tools and maintain consistent communication to build trust and sustain commitment. You may already have an existing group or groups doing this work under a different name. It isn't necessary to create a new group, but it is important to confirm that everyone is on the same page about the purpose.
- **Build on existing knowledge:** While empirical evidence for the communitywide MHFA implementation approach is limited, we draw from comparable frameworks and anecdotal data from surveys and focus groups. With elements of the collective impact model, the Road Map has a solid foundation that has been further tested and informed by a group of pilot site organizations with extensive MHFA implementation experience.
- **Prioritize timelines:** The timeline for achieving success when using the Road Map varies by community. Factors like readiness, collaboration and resources influence progress, along with ensuring alignment with local needs, which requires regular evaluation and flexibility.

Community Assessment



> ***"Needs and resources are really two sides of the same coin. To get a comprehensive view of your community, it is important to look at what you have and what you need."***
>
> — The Community Tool Box Assessment Framework, University of Kansas

Community Assessment is a practical, systematic approach for identifying local health needs and existing assets. It involves collecting, analyzing and using data to understand a community's strengths, challenges and priorities. A community may be defined geographically (e.g., neighborhood, city, county or state) or by specific populations such as veterans, law enforcement, higher education, youth or other priority groups with elevated mental health needs.

An effective community assessment examines both needs (gaps in services, barriers to care, unmet demand) and resources (existing programs, partnerships, workforce and infrastructure) that can be leveraged to address those needs. This dual focus serves as the foundation for implementing MHFA in ways that are relevant, community informed and sustainable. To create meaningful and lasting impact, mental health programs must align with a community's unique context, priorities and available resources. Without this alignment, even the most well-designed programs risk limited reach or sustainability. Community assessment provides the foundation for tailoring initiatives such as MHFA to the realities of the community they serve. Early assessments foster local involvement, ownership and collaboration, setting the stage for relevant, data-driven and community-informed programming.

While many communities introduce MHFA in response to urgent mental health concerns (e.g., suicide risk, trauma exposure, youth stress), integrating MHFA proactively as part of a coordinated, multitiered prevention strategy strengthens early identification, intervention and referral systems before crises escalate. When embedded within broader prevention frameworks, MHFA supports accessible, long-term community wellbeing.

KEY ACTIVITIES

Best practices for getting started with community assessment include the following key activities:

1. Identify your community's mental health needs.
2. Conducting a community resource scan.
3. Using assessment findings to guide action.

Let's explore each of these in detail.

Identifying your community's mental health needs

(Adapted from the Community Tool Box Assessment Framework, University of Kansas — Assessing Community Needs and Resources)

A comprehensive needs assessment ensures MHFA initiatives are grounded in an accurate understanding of community priorities and challenges. This process begins by clarifying the purpose of the assessment, identifying existing data sources and determining where additional information is needed. Communities should first review publicly available data, including:

Community health assessments (CHAs): In most states, mental health is a priority area in CHAs and community health improvement plans (CHIPs), which consistently highlight limited access to care, stigma, and workforce shortages — areas where MHFA provides critical support.

State public health dashboards: State public health dashboards and datasets identify priority areas such as mental health professional shortage regions or rural service deserts. Review statewide and local public health dashboards or assessments to understand the need for mental health awareness and education programs.

County health rankings: Another valuable resource to understand the demographics and vital information about a population at a county level is the county health rankings data.

Certified Community Behavioral Health Clinics (CCBHCs): CCBHCs offer valuable, real-time insights into local behavioral health needs and service gaps. They are required to assess community needs, improve access and provide services through active partnerships, making them strong collaborators for communitywide MHFA planning.

Health care institutions, particularly nonprofit hospitals, are required under federal law to regularly conduct community health assessments. These involve collecting data on health outcomes and priority health needs, and ensuring transparency and accountability. Your MHFA implementation should align with these broader state and local health strategies. For example, in some states, MHFA is incorporated into community health improvement plans, strengthening the continuum of care by empowering community members to serve as first responders.

From these data sources, you can identify gaps that require further information through listening sessions, interviews, focus groups, surveys or direct observation. This structured approach strengthens MHFA implementation by grounding strategies in meaningful, data-driven insights about community needs and assets.

Conducting a community resources scan

A community resources scan identifies existing assets, services and partnerships that can support MHFA implementation while highlighting where gaps may limit impact. Guided by the Community Toolbox framework, organizations should develop an inventory of local behavioral health and prevention programs, funding sources, and cross-sector partners that provide context-aware, linguistic and outreach support to priority populations. They should also note the active MHFA Instructors within their community.

Frameworks like the Community Care Mapping Tool provide a structured, visual format for capturing how mental health assets, partners and activities are distributed throughout the community. It helps communities see connections, overlaps and gaps across settings and populations, making it easier to prioritize outreach, Instructor development and partnership opportunities. The tool is intended to be revisited and updated over time as MHFA capacity grows and community needs evolve.

Figure 2: Community Mapping Tool

Community Care Coordination Mapping Tool Use this tool to map which government, business and social services your organization currently or potentially could coordinate with.						
Organization name	**Type of service provided by the organization**	**Coordination agreement in place?**	**Data being shared by this org?**	**Name & contact information for designated care coordination staff**	**Care coordination staff meeting cadence**	**Notes**
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

This process should draw on multiple data sources, including direct data requests from the National Council. The MHFA U.S. Reach dashboard, Find an Instructor tool or Request Assistance Form can also be used to locate state-specific information, including existing MHFA trainings and areas lacking Instructors and First Aiders. In addition, 211 Services and reviews of statewide or local prevention initiatives and legislative appropriations may be useful. Findings should be documented and reviewed with partners to clarify where MHFA can strengthen existing efforts rather than duplicate them.

Using assessment findings

Once the needs assessment and community resources scan are complete, organizations should use those insights to guide action planning and continuous improvement. Align MHFA implementation with identified priority areas in CHA and CHIP reports, while leveraging existing assets such as active Instructors, community partners and funding streams.

Organizational leads should clearly articulate why MHFA is needed, who it is intended to serve and which populations or areas experience the greatest barriers to care. Linguistic and other contextual factors that shape how mental health is understood and accessed should inform outreach and delivery strategies. At the same time, organizations should assess internal readiness, including staffing capacity, Instructor availability and understanding of different backgrounds and perspectives. Feedback from the Road Map pilot sites reinforced that successful implementation begins with an honest self-assessment of organizational capacity and context awareness prior to program rollout.

Engage local champions and cross-sector partners to co-develop outreach strategies that build on existing resources and address identified gaps. Use assessment data to set clear, measurable goals and track progress regularly. Refer to Core Principle: Strategic Planning for information on goal setting. Integrate findings into broader community wellness and prevention plans to reinforce coordination and sustainability.

As organizations identify shared priorities, assets and gaps through the assessment process, these insights naturally inform the next phase of work: strengthening community collaborations to align roles, coordinate efforts and collectively advance mental health awareness, prevention and early intervention.

To make assessments actionable, organizations should define methods to gather information on the two interrelated dimensions: community needs and community resources.

Area of Assessment	Example Indicators	Sources of Information	Purpose
Community Need	• Suicide rates, 988/911 mental health call volumes • Emergency department visits • School absenteeism • Mental health professional shortages	• Community health assessment • Community health improvement plan data • County health rankings database • Direct requests for MHFA training • Local public health dashboards • CCBHC assessment data	**Quantifies unmet need and urgency**
Community Resources	• Active MHFA Instructors • Local behavioral health programs • Available funding for mental health programs • Cross-sector community partners and services • Priority populations/ areas needing mental health services	• Direct data request from the National Council • MHFA U.S. Reach Dashboard • Find an Instructor tool • Community Mapping Tool • Ongoing statewide or local prevention efforts • 211 services • State legislative appropriations	**Identifies existing assets and infrastructure to build on**

A comprehensive assessment of community needs and resources provides the evidence required to design responsive and sustainable MHFA implementation. By aligning findings with state and local CHA/CHIP priorities and integrating MHFA into the broader prevention and early intervention continuum, communities can reduce stigma, strengthen local capacity and promote long-term mental health and wellbeing. Community-specific education, engagement with trusted leaders, and programs like MHFA help improve mental health literacy, reduce stigma and promote help-seeking behaviors (Jorm et al., 2004).

EXAMPLE IN PRACTICE

Community Assessment

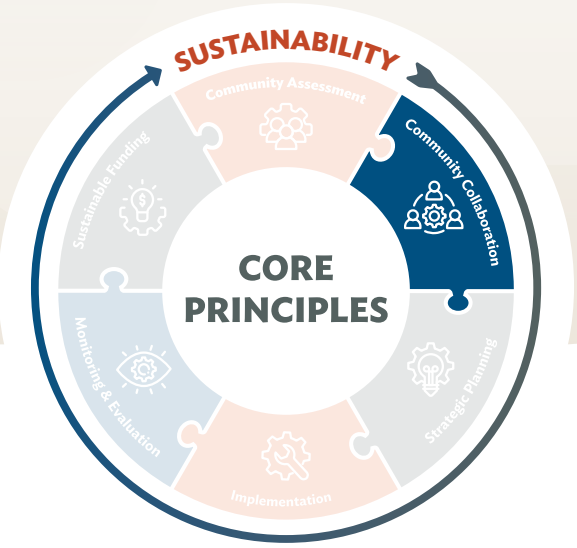
Sweetser, a long-standing behavioral health provider in Maine, conducted a community resource scan to identify areas in need of mental health programs and available supports, strengthen partnerships, and enhance outreach to ensure training reach.

Sweetser used data from the Maine Integrated Youth Health Survey, conducted biennially by the Maine Department of Health and Human Services and the Maine Department of Education, to identify the Sanford area as having higher-than-average rates of youth mental health and substance use challenges, emphasizing the importance of early intervention and coordinated response.

Based on the survey results, Sweetser ramped up its outreach efforts to identify key community partners for trainings and updated its promotional materials to raise awareness of local MHFA offerings in Sanford and surrounding communities. Through thoughtful community needs and resources assessments, Sweetser strengthened local partnerships and expanded local engagement through targeted marketing and outreach. Sweetser's insights further highlighted that such assessments should account not only for external resources, but also for an organization's internal understanding of its focus population, community needs, and functional capacity to reach and serve specific communities effectively.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.

Community Collaboration



> ***"No single organization or sector alone can solve large-scale societal problems; coordinated efforts are necessary for significant, systemic change."***
>
> — Kania & Kramer, 2011

Scarcity, particularly the lack of consistent funding, pervades nearly every aspect of the nonprofit sector, often driving competition between organizations and limiting their ability to collaborate. However, collaboration is essential for addressing large-scale challenges. By prioritizing collaboration over competition, organizations can share resources, leverage each other's strengths and drive system-level changes. Successful partnerships — such as advocacy groups joining forces for policy reform, or community organizations aligning to tackle local issues — demonstrate the power of working together. Collaboration often begins with a shared agenda and a shared vision, creating a foundation for lasting impact (Pittman, 2015).

Despite the clear benefits, collaboration in implementing trainings such as MHFA can be challenging. Fragmented stakeholder interests, competition for funding and a lack of trust can lead to misalignment and inefficiencies. Varying objectives and strategies can create silos, hindering efforts to scale MHFA effectively. To overcome these obstacles, building trust and fostering strong partnerships is critical for MHFA's successful implementation across communities.

MHFA community initiatives thrive when collaboration is prioritized early on. By bringing together different groups with a shared purpose, organizations can pool resources, expertise and unique perspectives, fostering a more effective approach. Collaboration not only reduces service duplication but also streamlines processes and enhances overall efficiency. This approach allows organizations to reach more individuals with fewer resources, ultimately resulting in more holistic solutions and a greater collective impact than siloed efforts.

Community collaboration is often the key to amplifying your mission without overburdening your organization's team or budget. More importantly, it increases the impact on the communities you aim to serve. One critical step in the process is educating the community and potential partners on the need for MHFA. Misunderstandings, often fueled by stigma and lack of awareness, have created ambivalence toward mental health and substance use treatment. Addressing these misconceptions and raising awareness will pave the way for stronger support and buy-in from various community stakeholders.

To build effective partnerships, it's vital to engage a broad range of community members. This includes county officials, health and behavioral health providers, community organizations, small businesses and local corporate partners. Additionally, bringing in people receiving services and local community members will cultivate trust and support for the initiative.

Part of community collaboration is knowledge of the Instructors and organizations within your area who are also doing this work. This can be done in several ways. Accessing Find a Course through the MHFA website is a helpful way to look for local Instructors. You can also submit a Request Assistance Form to the MHFA data team to look for organizations in the area that are also doing this work.

By focusing on collaboration and community involvement, you can create a stronger, more sustainable MHFA initiative that truly reflects and supports the needs of those it aims to serve.

KEY ACTIVITIES

Community collaboration for communitywide MHFA implementation includes:

1. Gaining partnership through storytelling
2. Future mapping
3. Identifying champions
4. Establishing a Steering Committee

Gaining partnership through storytelling

A program is only successful when community engagement and trust are prioritized early on. An impactful way to educate community members and secure buy-in for partnerships is through storytelling. Stories from those with lived experience of mental health and substance use challenges have a unique power of creating connection. When shared ethically and authentically, these stories can inspire changes in attitudes, beliefs and behaviors.

Crafting a compelling story helps providers and individuals share person-centered narratives that highlight how mental health or substance use challenges have shaped their lives, the support they received and the hope they found in recovery. These stories can build empathy, foster understanding and create momentum for collaboration.

What can you do to gain partner buy-in?

- Share relevant information with organizational leaders — highlighting data and community needs — through standing agenda items, email updates and quarterly meetings. Remind leaders of the importance of fiscal resources and personnel.
- Ensure an information flow with community leaders and members (discussion forms, sharing community assessment results, kickoff meetings, links to websites).
- Reflect back on the community's current needs and how MHFA addresses them.
- Think through additional support or strategies that are required to achieve this vision.

Building long-term, sustainable partnerships takes time and often requires shared goals. When choosing partners, find out what drives them and what barriers they are encountering. If they see you as a problem solver and champion for their cause, they will be more likely to join in to support your goals Questions to ask prospective community partners can include:

- Which community members do we need to build relationships with to ensure successful community engagement?
- What are community members' needs, wants and concerns?
- What key points in our message align with community members' needs, wants and concerns?

Future mapping

Developing a system for the future requires identifying the services, support and communication strategies needed across every step of the continuum to provide comprehensive communitywide MHFA support.

A critical element of this future system is establishing a clearly defined role for outreach and engagement responsibilities. This role is essential for building and maintaining relationships with community partners, coordinating communication across sectors, supporting recruitment and participation, and ensuring that MHFA efforts remain visible, accessible and responsive to community needs.

Sample Role Description: MHFA Community

The MHFA Community Liaison serves as the primary connection between the MHFA initiative and the broader community. This role leads outreach and relationship-building, coordinates communication across partners, and supports engagement and implementation to ensure MHFA efforts are visible, accessible and aligned with community needs.

Key responsibilities include:

- Leading outreach and engagement with community partners and stakeholders.
- Coordinating communication and information-sharing across MHFA efforts.
- Supporting recruitment and participation in MHFA training.
- Connecting community feedback to Steering Committee planning and decisions.

Effective MHFA community outreach relies on intentional relationship-building, organized contact tracking and creative engagement strategies. By systematically mapping community entities, using varied outreach methods (in person, email, social media and word of mouth), and maintaining Instructor quality and flexibility, organizations can significantly expand training reach while sustaining program impact.

Outreach tips to consider

- **Use a structured outreach contact list** (as shown in Figure 2 in Core Principle 1) with multiple tabs to identify schools, businesses, government agencies, health care systems, faith-based groups, transportation services and community organizations.
- **Invest upfront in outreach planning.** Maintaining and updating contacts annually saves time and expands collaboration opportunities.
- **Prioritize in-person outreach** to build relationships and reduce initial resistance.
- **Leverage creative communication**, including engaging email subject lines, QR codes and timely social media posts aligned with observances and awareness months.
- **Ensure high-quality instruction.** Engaging, well-prepared Instructors drive positive word-of-mouth referrals and repeated participation.
- **Always promote upcoming classes,** attend community events and travel with registration forms and links prepared.
- **Balance flexibility with boundaries** around teaching days and times to prevent burnout and sustain long-term Instructor interest and engagement.

This future-focused mapping approach also supports alignment across related initiatives, strategies and task forces, helping communities coordinate efforts, reduce duplication and maximize impact. By intentionally connecting partners, outreach activities and implementation efforts, communities can ensure that each action is aligned with shared goals and contributes to sustainable, meaningful outcomes.

Identifying champions

An essential aspect of collaboration is ensuring champions from the communities you aim to serve are part of the process. Engaging voices from inadequately represented populations is key to gaining buy-in and making your efforts more impactful. Involving community champions helps ensure initiatives are person-centered and respect individual and community agency. Individuals then feel empowered to shape their own engagement. This approach is especially important given the history of mental health services within communities where mistrust and barriers to care have been long-standing.

Champions can play a pivotal role in community collaboration by acting as trusted leaders who foster engagement, facilitate communication and connect different groups. These passionate advocates are needed for building a sense of collective action and driving participation in initiatives. Prioritizing relationships with and supporting champions ultimately contributes to the success and longevity of your program. Champions can spearhead events, activate their personal and professional networks, participate in campaigns and guide community members to the appropriate resources. They serve as key drivers of progress and support.

Establishing a Steering Committee

A well-structured Steering Committee is crucial for scaling MHFA implementation successfully. In this Road Map's community assessment principle phase, you will or have identified existing community health coalitions or consortiums. Before establishing a new partnership, it's important to assess these existing groups and evaluate opportunities for collaboration. As mentioned in the introduction, Steering Committees play a key role in enhancing the scalability, accessibility and sustainability of MHFA initiatives. By uniting different community partners, sharing resources and fostering a shared commitment to mental health, Steering Committees transform fragmented efforts into a cohesive, impactful movement.

To engage partners with different backgrounds and perspectives, it is important to have clear roles and expectations. The Steering Committee should bring together representatives from local and state government, mental health organizations, corporate sponsors and community groups, as well as experienced Instructors. Acting as the governing body of the program, the committee will expand reach, ensure the plan reflects community input and enhance the program's long-term sustainability.

Your Steering Committee should include members from the populations you aim to serve, such as veterans, first responders or rural community members, and embrace a community-informed approach for effective outreach and implementation. Building trust and relationships can be achieved by attending local meetings, volunteering at community events and organizing a community listening tour to better understand local needs and concerns.

Effective community engagement can help build sustainable partnerships. Successful promotion begins with creating a centralized hub, such as a dedicated website, where community members can easily find information about your MHFA initiative, upcoming trainings and ways to get involved. This hub serves as a consistent, trusted source of information.

Leverage existing National Council resources to guide your marketing strategies, messaging and outreach language. Such resources include the MHFA Instructor Marketing Toolkit and First Aider Pitch Deck — available on the learning management system — as well as the Building Your MHFA Business webinar. The MHFA Team is available at Hello@TheNationalCouncil.org to help provide relevant information or resources.

To reach varied audiences, use multiple promotional strategies and channels, such as:

- Sharing engaging social media content (photos, short videos and graphics).
- Partnering with community newsletter editors to feature updates and success stories.
- Distributing flyers at schools, community centers, libraries and local businesses.
- Incorporating storytelling and testimonials to humanize the impact and build relatability.

Together, these approaches help ensure broad visibility, consistent messaging and sustained engagement across the community.



Tip: Involve Community Partners in Reviewing Promotional Materials!

Engage your community partners and established teams in reviewing your promotional materials. Create a feedback loop by actively listening to their insights and implementing necessary adjustments. This ensures that your materials are accessible and engaging, and that they resonate with your target audiences, ultimately increasing your messaging's effectiveness.

Communicating effectively for buy-in is key in building long-term, sustainable partnerships. It involves aligning project goals with partner expectations, fostering a collaborative environment and ensuring transparent, purpose-driven communication. The following is a sample outreach email template.

Sample Outreach Email Template

Hello _____,

On behalf of our Mental Health First Aid (MHFA) Implementation team, I am writing you to establish a formal partnership and collaboration with you and your office.

MHFA is an evidence-based training that strengthens communities and organizations by empowering people to respond to someone experiencing a mental health and substance use challenge or crisis and help connect them to care. It encourages early intervention and reduces stigma. More than 4.5 million people across all 50 states and U.S. territories have been certified as Mental Health First Aiders. Additional information can be found at MentalHealthFirstAid.org.

Our vision for this implementation is to have a communitywide approach that:

1. Ensures MHFA is introduced or expanded strategically, systematically and sustainably.
2. Reaches different populations across entire communities.
3. Engages community leaders, organizations and residents to collaboratively identify needs and solutions.
4. Develops a community-informed plan that includes stigma reduction, outreach programs, and policy changes addressing broader societal factors impacting mental health.

As one of our county leaders, we invite and encourage you to bring Mental Health First Aid to your community. You can start by becoming a certified First Aider to experience MHFA's impact firsthand. The eight hours will be an investment in your mental health as well as that of your loved ones, colleagues and those in your community.

We would be happy to schedule a session on a Saturday for you, your supervisors, colleagues and other executives. More information about the training can be found at _____. We look forward to partnering with you on this impactful initiative.

Warmest Regards,

[Your Name & Title]
[Your Organization]
[Contact Information]

EXAMPLE IN PRACTICE

Community Collaboration

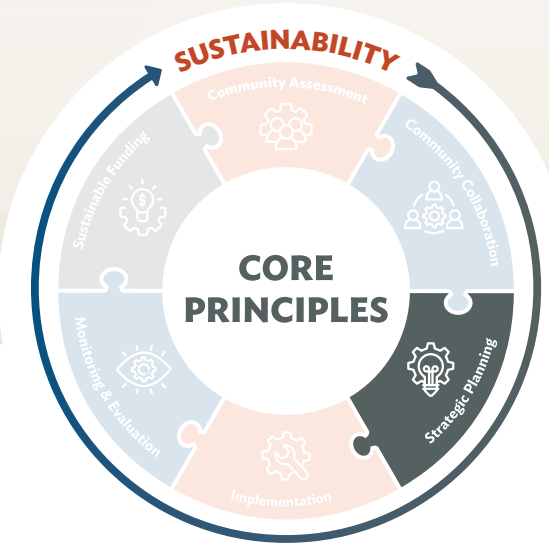
Hill Country Mental Health and Developmental Disabilities Centers is a Texas-based mental health organization which has focused extensively on building partnerships in its community.

The deep, meaningful connections the organization has created have been essential for community reach, responding to community needs and crises, and enabling the organization to feel comfortable to reach out for support. These relationships have been vital in the aftermath of several traumatic events in the organization's 19-county catchment area. Even though help and resources from across the country were available, its established local alliances positioned the organization for long-term recovery support. Relationship building has helped in times of crisis in the community.

The Hill Country MHDD Centers team emphasizes the need for flexibility and persistence when seeking partnerships with community members or organizations. This means reaching out continually — through emails, phone calls, tabling at community fairs and intentional conversations. "Be realistic about your expectations," the team shared, "Several doors will get shut in your face! Keep working hard on outreach. It's not going to happen overnight." While the team also said it found using real stories of impact and lives saved helpful, what was even more valuable was sharing everyone's passion for mental health.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.

Strategic Planning



> ***"A general recommendation I would make to anybody thinking of doing a communitywide program is to be very intentional in your planning and goal setting."***
>
> — Anonymous Focus Group Participant

Strategic planning is the process of creating a clear vision, defining measurable goals and objectives, and developing an actionable plan to achieve them. This process is often led by a cross-sector Steering Committee, providing an invaluable opportunity to revisit your program's purpose and create alignment with both the MHFA framework and your community partners.

A well-executed strategic plan helps organizations maintain focus, maximize their impact and avoid redundancy. Many organizations offering MHFA aspire to become the primary provider in their community, but this can sometimes lead to a sense of isolation or competition with other organizations. The temptation to say yes to every request can hinder your program's effectiveness and ability to achieve its goals. By creating a shared vision for your initiative, you will be better equipped to recognize when an activity aligns with your collective objectives, as well as when it's time to decline opportunities that may divert resources or attention. A clear, strategic plan lays the groundwork for collaboration, including identifying resources and partners, and supports evaluation efforts. With continuous quality improvement methods in place, you can regularly revisit your goals and objectives and adjust your approach as needed to stay on track.

It's essential to help your cross-functional Steering Committee understand the value of strategic planning and dedicate time to this critical process. Engaging with your partners early to gain investment is key for the planning phase and the long-term success of your program. Barriers to successful communitywide implementation — such as lack of leadership buy-in, limited resources, resistance to change and ineffective communication — can derail progress. By prioritizing collaboration and strategic planning from the outset, you can focus on long-term goals and avoid potential obstacles down the road.

Essential Mindset Shifts for a Successful Steering Committee

FROM independently setting a vision	→	**TO** stewarding a network to agree on a common result and collectively build the agenda to achieve it
FROM focusing on program-level results	→	**TO** pursuing communitywide outcomes and impact
FROM centering the coordinating organization	→	**TO** aligning, encouraging and managing organizations and community leaders to act together

Figure 3: Adapted from Collective Impact Forum's Mindset Shifts for Effective Collaboration and Action

Steering Committees are valuable for providing clear leadership, direction, decision-making structure and opportunity for shared power. Figure 3 outlines how organizations can move from independent vision-setting to stewarding a collective vision, from program-level results to communitywide outcomes, and from focusing on the organization to aligning and managing the network for collective action (Samari & Schmitz, 2024). While we recommend having a distinct decision-making team, or Steering Committee, we recognize that this may include many of the same individuals as the implementing team, or MHFA Program Team, and that both teams may expand or change as your MHFA initiative grows.

What can you do to gain leadership buy-in?

- Share relevant information with organizational leaders, highlighting data and community needs, through standing agenda items, email updates and quarterly meetings. Remind leaders of the importance of fiscal resources and personnel.
- Ensure information flow with community leaders (discussion forums, sharing community assessment results, kickoff meeting, links to websites).
- Reflect back on the community's current needs and how MHFA addresses them.
- Think through additional support or strategies that are required to achieve this vision.

KEY ACTIVITIES

Strategic planning for the communitywide MHFA implementation should include the following key activities:

1. Creating a shared vision.
2. Identifying opportunities and barriers.
3. Developing a sustainable operational plan.
4. Building a sustainable initiative

The following discusses each of these recommendations, why they're integral and how they'll help your implementation.

Creating a shared vision

A shared vision and vision statement will serve as a guiding light for your Steering Committee, keeping the communitywide MHFA implementation's desired outcomes and benefits at the forefront. It will provide clarity and direction, helping your coalition stay focused on increasing the community's capacity to respond to mental health needs. Whenever you face decisions, you can revisit the vision statement to ensure your actions align with your long-term goals. For practical guidance on creating a vision, mission and objectives, check out the Community Tool Box's overview (Center for Community Health and Development, n.d.-c).

A strong vision helps frame the conversation and ensures the team works together toward overcoming obstacles. For example, a vision statement could be: "Having 1 in 15 adults certified in Adult MHFA across the state." Tailor your vision to your unique program and community — don't be afraid to dream big!

As you define your vision, consider these key questions:

- How does MHFA align with this shared vision?
- How does MHFA address the community's current needs?
- What additional support or strategies are required to achieve this vision?

Identifying opportunities and barriers

After creating a collective vision, it's crucial to assess the available resources and identify potential barriers to successful implementation. Consider the focus and scale of your current program and evaluate how it may need to expand or adapt to meet your vision and goals. Reviewing your program's budget is a key step in understanding these opportunities and challenges.

Take time to evaluate both personnel and program resources:

- **Personnel resources:** This includes assessing the availability and capacity of operational staff, as well as the expertise or certification status of staff members, MHFA coordinators and Instructors, and their fit within the community.
- **Initiative resources:** Consider factors required to deliver MHFA training at a larger scale, such as transportation to implementation sites or ability to access virtual platforms, learner recruitment, promotional materials, timelines, and funding to cover costs related to materials, Instructors and staff time.

It's important to set clear, realistic expectations from the start. In one of our focus groups, participating organizations emphasized that developing a communitywide MHFA initiative can be complex and comes with unexpected challenges, such as funding delays, shifting timelines and Instructor turnover. They highlighted the importance of understanding the steep learning curve involved and remaining flexible to adjust as needed.

Additionally, setting clear expectations with Instructors and clients is vital. Ensure that everyone understands their roles and responsibilities, such as planning, scheduling, administrative tasks and payments, so there's no confusion throughout the process.

As you identify opportunities and barriers, consider these key questions:

- What successes have community initiatives experienced in the past?
- What strategies or approaches have proven effective, either through your own experiences or those of other initiatives?
- What is feasible given your capacity, resources and setting? (Use this question to establish realistic goals around training reach.)
- What potential barriers could hinder progress toward your vision?
- How can you apply strengths-based strategies to overcome each identified barrier?

Developing a sustainable operational plan

The first steps of communitywide implementation may feel daunting, so including clear objectives and activities for the initiative — from selecting Instructors and scheduling trainings to collecting and monitoring evaluation data — will help guide the team where to start. Now that you've identified implementation opportunities and barriers, your next step is to collaborate on developing a sustainable operational plan, starting with strategic goal setting. Begin by assessing your current position relative to your vision and defining where you want to be in three to five years. Consider the scale of your initiative, the implementation settings and the focus populations to guide your goal development. Ensure that each goal and objectives align with your communitywide vision.

To make your goals actionable, apply the SMART framework to the objectives:

- **Specific** — What details can you fill in that make this objective specific to your initiative?
- **Measurable** — How will you track data? How will you know you've been successful?
- **Achievable** — Confirm that this objective is something your initiative can accomplish in the allotted time. Look back at previous objectives or similar initiatives to help ensure realistic expectations.
- **Relevant** — Does this objective relate specifically to the goal and shared vision for your MHFA initiative? Are there elements that need to be removed or redirected to ensure alignment?
- **Timebound** – Give your team a deadline. When do you hope to accomplish this objective by?

Begin by brainstorming SMART objectives that will move you closer to your vision. Start small to ensure manageable progress. Collaborate with your Steering Committee to define one to two primary goals, then identify five to six SMART objectives for each that align with your overall vision. Stick with just two objectives per year, knowing that each objective will contain multiple action steps. Remember, you'll need to track and report on the progress of each objective throughout the program's implementation. While goals may be broad and long-term, objectives should focus on short-term milestones with clear, actionable steps that will help achieve each goal. See **Core Principle: Implementation** for guidance around action planning.

Having a plan for monitoring and managing your strategic plan is crucial to ensure you're effectively meeting your goals. This involves regularly tracking progress and conducting monthly or quarterly reviews of your strategy. If challenges arise that slow progress or present barriers to goal achievement, it may be necessary to reconvene the Steering Committee to address these issues. Additionally, goals may need to be adjusted based on new insights or information. We recommend holding quarterly meetings to review your strategic plan. It's important to clarify who is responsible for attending these meetings and to establish a process for building consensus when making key decisions. This concept will be explored further in **Core Principle: Monitoring and Evaluation**.

Building a sustainable initiative

Weaving sustainability into your action planning requires your team to think intentionally about funding, budgeting and Instructor engagement.

- Sustainable funding: Securing sustainable funding for your initiative is a crucial element of strategic planning. It's important for the Steering Committee to approach funding as a shared responsibility to ensure the program's long-term success. While short-term grants can provide the initial momentum to launch the program, long-term sustainability requires a focused effort to identify and secure reliable funding sources. Establishing permanent financial support

— whether through public funding, corporate partnerships, sponsorships or state budget allocations — is essential for maintaining and growing the initiative. This should be an ongoing agenda item for Steering Committee meetings. Strategies for securing sustainable funding will be discussed in Core Principle: Funding.

- Intentional resource allocation: A well-planned budget allows for investment in recruitment strategies, compensation, onboarding processes, training activities and retention initiatives (e.g., professional development opportunities), all of which facilitate hiring and strengthen team stability. Without adequate budgeting, organizations risk high turnover, low morale and the loss of valuable skills. By prioritizing resources for Instructors, organizations set the foundation for a motivated, capable and long-lasting workforce. When organizations maintain a pool of trained Instructors invested in this work, they have a strong, reliable group to draw from for contracts, per diem opportunities and other staffing needs.
- Instructor engagement: When expanding MHFA, organizations often focus on scaling up by increasing Instructor quantity first. However, this is one area where it may make sense to start small and scale over time. Here are some notes to keep in mind when you are considering bringing several Instructors together:
  - » Clarify expectations for Instructors and strive for sustainable community representation.
  - » Think about course administration responsibilities — are there opportunities for this to be shared?
  - » Feeling supported and having access to information is key. What opportunities exist for Instructor mentoring and communication? When onboarding multiple Instructors at the same time, consider creating avenues for peer support and dialogue.

EXAMPLE IN PRACTICE

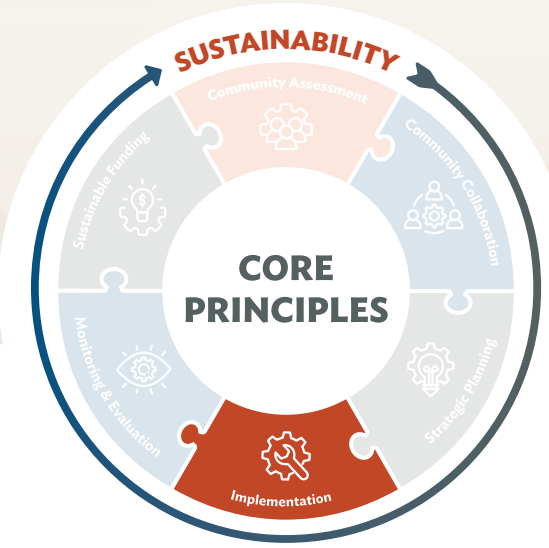
Strategic Planning

Kingdom Love, a community-based organization located in the Bay Area of California, is dedicated to bringing MHFA to communities with unmet needs. As part of its strategic planning, Kingdom Love has worked to better understand opportunities and barriers to effectively reach its populations of focus. The team discovered that Instructor recruitment and retention can be an obstacle to community reach and has learned just how important clear expectation-setting is when recruiting new Instructors. The organization is intentional about having community representation in the MHFA Program Team, particularly among Instructors, as well as accessing community-specific data related to mental health.

Along the way, Kingdom Love has learned that strategic planning is an iterative process. Opportunities and barriers fluctuate with time and through the planning and implementation process. The Kingdom Love team navigates this by creating space for ongoing discussions during monthly meetings and open communication and trust building with the communities they engage.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.

Implementation



> ***"Implementation is the bridge between strategy and impact — ensuring that mental health prevention efforts are delivered with fidelity and supported by the systems and resources necessary for long-term success."***
>
> — Fixsen et al., 2005

It's crucial to work closely with your MHFA Program Team to develop a detailed plan for communitywide implementation. While MHFA implementation often focuses on training Instructors and deploying them into the community, Instructors — and Coordinators — play a central role in scaling the program and are key members of your MHFA Program Team.

Effective implementation planning is critical for reaching communities in an efficient and sustainable manner. It facilitates collaboration among organizations and partners, allowing for broader reach and resource sharing, ultimately supporting the expansion and successful achievement of your goals.

Without early community collaboration, there's a risk of duplicative work, training without the necessary funding or staffing infrastructure, or training Instructors without a clear plan to reach communities. Additionally, this approach may overlook the importance of understanding the lived experience within the community, which is vital for ensuring that MHFA is well received and impactful.

While implementation planning builds upon strategic planning, these areas may require a different set of partners. The following table further outlines the distinctions between strategic and implementation planning, including the purpose, scope and involved stakeholders.

	Strategic Plan	Implementation Plan
Purpose	Defines vision, mission and goals	Defines how to execute the strategic plan
Scope	Broad, long term. Guide high-level priorities	Specific, short-to-medium term. Focus on day-to-day execution
Focus	What to achieve and why	How, when and who will execute the plan
Components	Vision, mission, values and goals	Tasks, roles, timelines and resources
Audience	Leadership and stakeholders	Project teams and implementers
Time frame	3-5 (or more) years	6 months to 2 years
People/group responsible	Steering Committee (leaders and representatives from partner groups)	MHFA Program Team (members from each partner organization prepared to carry out activities; includes MHFA Instructors and Coordinators)

"The roles participants felt were critical to their teams varied based on their initiatives, and included Coordinators, consultants and partners from other organizations. However, one role that came up more than once was having a detail-oriented [MHFA] Coordinator to manage trainings, invoices, payments and Instructor support, and how much of a burden that took off implementation staff who juggle multiple tasks, including fostering partnerships, researching and securing funding, and expanding the program. One participant called it 'having a front-facing team."

— Anonymous Focus Group Participant

KEY ACTIVITIES

This core principle emphasizes a strategic and collaborative approach to implementation, which includes the following key activities:

1. Establishing a MHFA Program Team.
2. Developing an action plan.
3. Implementing sustainably.

Establishing a MHFA Program Team

Developing a MHFA Program Team with members from each partner organization is key for action planning, ongoing quality improvement and long-term success. This is the team that will carry out your objectives and activities. When determining who should be part of the MHFA Program Team, it's important to consider individuals who represent the community and your partners, and who have insight into different implementation process steps. Members may include MHFA program leads, Instructors, Coordinators, and monitoring and evaluation leads. In some instances, MHFA Program Team members may also be part of the Steering Committee. The MHFA Program Team will work to execute the Steering Committee's established strategic goals by developing an action plan and timeline for program implementation activities and will identify the person responsible for each step. It may be helpful to establish one team member responsible for coordinating and facilitating ongoing meetings.

Investing in Coordinators is crucial in supporting your communitywide MHFA implementation. A MHFA Coordinator manages the course logistics and learner enrollment for a group of Instructors. They communicate with the National Council regarding resources and updates, provide system and onboarding support, and do not require MHFA certification. Organizations can nominate individuals to receive Coordinator access by using the Request Assistance Form on the learning management system.

Instructors are also key players on the MHFA Program Team, which is why intentional recruitment and retention is pivotal. Retention is supported by setting Instructors up for success through adequate onboarding, mentorship and continuous improvement. You have several opportunities to support early engagement and sustainability with Instructors.

It starts with vetting. While it may be tempting to accept anyone who is eager to learn, not every individual or Instructor is the right fit for the initiative. It's important to select quality Instructors who are comfortable with public speaking, understand the material, have the capacity to take on the position and who have a connection to the communities they are serving.

As part of the recruitment process, you need to ensure potential Instructors have an accurate understanding of the expectations of their role. What responsibilities are required of Instructors outside of the training itself? How will Instructors be compensated? Once decided, some organizations establish a written agreement with community instructors through a memorandum of understanding or contract.

Establish the roles and responsibilities for each MHFA Program Team member for completing activities and achieving objectives. As you build an action plan for your goals, determine who is responsible for each activity. It may be beneficial to establish a workflow using tools such as the Responsible, Accountable, Consulted and Informed (RACI) chart. Play to your partners' strengths, whether

those are community connections, strategic marketing and dissemination, or Instructor education. Ensure everyone's roles are clear and understood by each partner. You can also encourage ongoing improvement using bidirectional feedback channels, such as a team communication app for debriefing and input, or a post-training form with space for concerns and requests.

Developing an action plan

Create an action plan for each objective to create clarity within the implementation process and ensure sufficient resources and staffing. You can also create a shared dashboard to monitor progress toward your goals. The following action plan offers an example of how to write your goals and objectives.

Figure 4: Example Action Plan

Goal 1, Objective 1: Develop a relationship over the next six months with a community-based organization (CBO) that offers services to veterans.						
Task	**Person Responsible**	**Priority**	**Status**	**Start Date**	**End Date**	**Notes**
Create a brief environmental scan of local CBOs offering services to veterans.	Program Coordinator	Medium	Complete	10/30	11/2	
Reach out to CBO to schedule a meeting to introduce MHFA.	Veteran Representative	High	In Progress	11/4	11/7	
Prepare materials for introductory meeting with CBO staff.	Program Coordinator	Low	Not Started	11/4	11/10	
Create indicators to monitor partner engagement	Program Evaluator	Medium	Not Started	10/30	11/10	

Develop a high-level timeline that details objectives and activities to organize them in a realistic time frame that accounts for capacity. If you notice an excess of objectives listed within the same quarter, it may make sense to shift the timeline or reconsider your capacity for each objective. Likewise, if the timeline extends past your funding period, consider how goals and objectives may be altered or condensed to fit within the timeline. Remember to give yourself wiggle room to allow for unexpected delays. Instructor availability, staff capacity, community engagement and external resources all have the potential to impact your timeline.

Your action plan should include data collection and tracking for each objective. If possible, identify the lead person to collect and monitor data for the initiative. Establish a data dashboard to allow for easy tracking, monitoring, and reporting to the Steering Committee. This process will allow you to determine if you are effectively reaching the goals and objectives or if there is a need to make changes to the action plan and/or implementation activities. More guidance for building this plan can be found in the next Core Principle.

Regular and transparent communication between the Steering Committee and MHFA Program Team ensures alignment, accountability and long-term impact. Along with your data dashboard, create a dedicated communication channel (e.g., Slack, Microsoft Teams) to strengthen collaboration. It is also helpful to define the frequency and format of updates, such as weekly check-ins, biweekly reports and monthly strategy meetings. Consistent engagement across teams and with partners fosters trust, streamlines coordination and reinforces shared goals throughout the implementation process.

Implementing sustainably

Sustainable implementation requires intentional collaboration with your partners and with the community. It's essential that the MHFA Program Team, including Coordinators and Instructors, feel engaged and supported at all steps of your communitywide implementation. Ensuring that the team has sufficient capacity, leadership support and technical tools (e.g., relevant information, communication channels) will allow them to effectively work within the communitywide system. A MHFA Program Team with a shared vision, goals and objectives that fully align with organizational values is more likely to be engaged and collaborate, leading to less turnover and fostering long-term success.

Providing accessible and quality MHFA training is a key piece of successful and sustainable MHFA initiatives. Our research indicates that trainings are more effective when MHFA Instructors have a personal connection to the communities they are serving, particularly for community-specific training. For example, if you are hosting a training for rural communities, ensure the Instructor has that community-specific certification, and, ideally, has lived in a rural community. You can also look into opportunities to increase engagement and participation, such as applying for certification to offer continuing education credits (CEUs).

In addition to providing a quality training experience with Instructors with community knowledge and connection, organizations also need to work with community leaders to remove barriers to accessing training. These may include location, time and lack of knowledge about the training. Partner with community leaders to share relevant information about MHFA — you can reference flyers and create your own FAQ documents to share via email, a flyer and/or website. Ask the leaders where and when to host trainings based on community members' availability and transportation options. When possible, meet the aspiring First Aiders where they are. This could mean hosting training at their place of employment, such as schools for educators or fire stations/crisis response locations for first responders. Organizations can also create ongoing feedback loops via evaluation data and informal channels to continuously improve the training delivery for further reach.

Sustainable implementation also includes close alignment with the funding plan and between partners. While funding strategy development is led by your Steering Committee, your MHFA Program Team reviews and manages the funding required for executing the strategic plan. The team develops and maintains the program's budget accounting for all costs that may be accrued throughout the year. To get started with budget planning, we recommend creating a detailed financial plan that outlines

projected expenses and revenue streams. This not only helps to manage funds but to also forecast the required funding and report to the Steering Committee effectively. The program budget should include funding for all resources listed in the action plan as well as staff time — and the associated costs — to complete activities. Details on strategies to secure sustainable funding are covered in Core Principle: Sustainable Funding.

Figure 4: Budget Line Items for Consideration

Category	Item Description	Cost	Notes
Personnel Costs			
Instructor fees	Hourly or session-based compensation	o	May vary based on the number of Instructors and sessions required
Administrative support	Staff for coordination and logistics	o	Includes scheduling, communication and documentation
Venue and Facilities			
Venue rental	Conference room or training space	o	Costs depend on location and size of the venue
Equipment rental	AV equipment, projectors, microphones	o	For presentations and interactive sessions
Training Materials *(Note: All materials are available for free in digital formats. Printed copies are optional, and can be purchased from the MHFA Store.)*			
Participant Manuals	MHFA training Manuals	o	Order from official MHFA Store
Participant Processing Guides	Supplemental materials	o	Order from official MHFA Store
Instructor teaching notes	Supplemental materials	o	Instructor teaching notes
Kits and supplies	Notebooks, pens, folders etc.	o	Participant kits for engagement and note-taking

Category	Item Description	Cost	Notes
Marketing and Outreach			
Advertising costs (printing)	Flyers and posters	o	Promoting the training to the target audience
Registration platform (Link to page for promotion of courses)	Website fees	o	For promoting the courses
Refreshments			
- Meals and snacks	Catering or refreshments for breaks	o	Optional, but improves participant experience
Technology Costs			
Online platform fees, Zoom license	Zoom or other virtual meeting tools	o	For remote or virtual sessions
Transportation			
Instructor travel	Mileage or airfare for Instructors	o	Based on location and travel distance
Participant travel	Subsidies for low-income participants	o	Optional support to increase accessibility
Miscellaneous Costs			
- Certificates of completion	Printing or issuing certificates	o	Includes design and distribution
- Contingency fund	Unexpected expenses	o	Allocated as a percentage of total costs
Total Operating Cost			
Total Estimated Costs: $_____		o	
Cost per Class: $_____		o	
Customize your budget based on the scale of your training and specific reporting needs.			

EXAMPLE IN PRACTICE

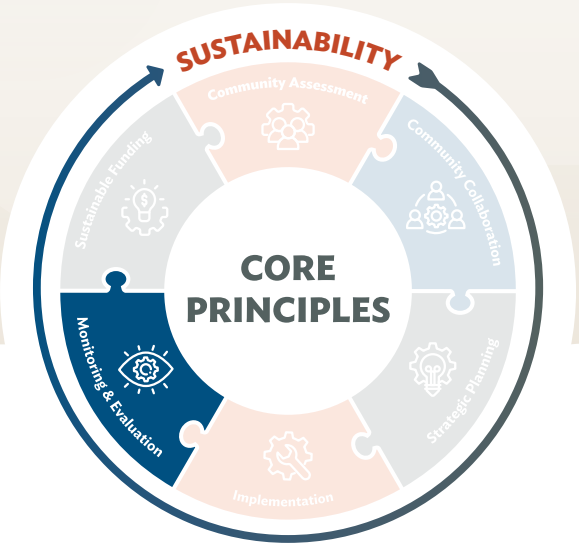
Implementation

Talkable Communities, a mental health initiative based in Northeast Florida, has experienced the value of taking intentional steps to establish and maintain its MHFA Program Team. Over the years of its MHFA implementation, the team has learned to be strategic about recruiting and retaining team members, including setting clear expectations about time requirements with Instructors.

Most recently, the Talkable Communities team decided to create a shared workflow and tracker in response to feedback from Instructors. This included the development of automated workflows and a comprehensive tracker for consolidating training details, Instructor assignments and participant outcomes. One Instructor noted that they chose to continue their work with the Talkable Communities team because they know they are valued and because the team makes the job easier. The team's intentionality and readiness to respond to feedback has created an atmosphere of shared understanding that encourages staff retention and effective team functioning.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.

Monitoring and Evaluation



> ***"Continuous improvement in mental health requires a cycle of learning — where measurement, reflection and adaptation become embedded in everyday practice."***
>
> — Adapted from Institute for Healthcare Improvement, 2003

Monitoring and evaluation are integral for assessing a MHFA initiative's' implementation progress, outcomes and impact. Monitoring involves continuous collection of data to ensure activities are on track and align with goals and indicators. It is vital to identify changes to adjust as needed. Evaluation, on the other hand, focuses on measuring overall initiative outcomes and effectiveness. It also provides insights into future enhancement opportunities and sustainability. Evaluation efforts and any resulting adjustments to your initiative should be aligned with the core intended outcomes of MHFA. Given the importance of monitoring and evaluation, MHFA USA has data-collection measures embedded within standard MHFA implementation to assist organizations with their initiatives.

In this Road Map, we encourage you to use a community-based lens for your monitoring and evaluation plan, while leveraging the tools from MHFA USA and resources in your community. Community-based monitoring and evaluation begins with identifying champions like MHFA Instructors and community leaders to co-develop an evaluation plan. Partnering with local evaluators and using participatory methods such as focus groups and storytelling ensures context-specific insights. Findings are shared transparently between the leading teams, partners and the community to build trust, inform decisions and create a feedback loop that enhances program relevance and impact.

To build capacity for monitoring and evaluation efforts — and to foster a unified measurement system — it is helpful to partner with local public health institutes, research organizations and universities or colleges to leverage evaluation expertise and resources.

A strong community-based monitoring and evaluation plan provides measurable evidence of success, which is vital for demonstrating value to funders, partners and the community members. It goes beyond tracking outputs, such as the number of people trained, to assess meaningful outcomes like reduced stigma, improved mental health literacy and increased access to mental health resources. An embedded monitoring and evaluation plan also enables organizations to refine their implementation approach, ensuring that MHFA initiatives remain impactful and sustainable over time.

Common challenges and solutions

Collaborating to create a robust monitoring and evaluation plan can feel like assembling a puzzle; however, with careful alignment and adjustments, any challenges experienced can become opportunities to create a unified picture of impact.

Common challenges you may experience in this process, alongside recommended solutions, are shared in the following:

Challenges	Solutions
Varied data-collection practices Different organizations may have varying methods and metrics for data collection and reporting, leading to measurement inconsistencies.	Standardize tools and processes, much like creating a universal key to unlock different data sets, ensuring all collaborators operate with the same foundational metrics. Aim to prioritize common metrics through the Steering Committee.
Resistance to data sharing Organizations may hesitate to share data due to concerns about privacy, ownership or misuse.	Build trust through transparent agreements and regular communication, akin to forming a contract where all parties are aligned on terms and protections.
Limited resources Some organizations may lack the funding or staff to support monitoring and evaluation initiatives.	Pool resources or seek external funding to support monitoring and evaluation activities. When possible, build personnel time and resources for monitoring and evaluation into grant budgets and applications. To build capacity, many organizations have found it helpful to partner with local public health institutes, research organizations and universities or colleges to leverage expertise, resources and measurement strategies.
Maintaining engagement Sustaining long-term engagement from all collaborators can be difficult.	Highlight the immense value of monitoring and evaluation by celebrating milestones and routinely sharing updates and data to maintain enthusiasm. MHFA champions and your Steering Committee can help promote sustained engagement.

KEY ACTIVITIES

Developing a robust community-based monitoring and evaluation plan is crucial for measuring impact and ensuring a MHFA initiative's success and sustainability within the community.

Best practices include the following key activities:

1. Collaborating and co-creating the evaluation plan.
2. Developing key evaluation questions and identifying metrics of interest.
3. Identifying data-collection methods.
4. Monitoring and reporting outcomes.

Co-creating the evaluation plan

- Engage your Steering Committee and key organizations (e.g., public health institutes, schools, health care providers, community groups) to co-develop and co-lead a community-based monitoring and evaluation plan.
- Define shared goals; designate roles for data collection, analysis and reporting; and schedule regular meetings to ensure alignment.
- Emphasize transparent communication to foster trust and accountability.
- Consider hiring an internal evaluator or partnering with an external expert to guide your monitoring and evaluation plan's creation and implementation.

Developing key evaluation questions and identifying metrics of interest

- Formulate your overarching questions to assess program effectiveness and identify areas for improvement. Examples include:
  - » Is the MHFA initiative increasing mental health awareness?
  - » Are trained individuals confident in applying MHFA techniques?
  - » Are Instructors implementing the program to fidelity?
- Identify both quantitative (e.g., number of courses, frequency of MHFA use) and qualitative metrics (e.g., learner perceptions of training relevance, Instructor feedback). Be mindful to include any required reporting metrics from funders.

Use the National Council's Fidelity Guidelines to monitor and ensure Instructors' adherence to fidelity using the National Council's guidelines as outlined in the MHFA Instructor Policy Handbook available to download on the learning management system.

- Collaborate with community partners to gather broader metrics, such as emergency room visits and referrals, to measure overall impact.

Identifying data-collection methods

Use tools like surveys to assess quantitative metrics. Consider pre- and post-training evaluations and periodic follow-ups while leveraging partnerships to access populations with unmet needs. Refer to the Reporting Guide to understand existing data from standard pre- and post-course evaluations. These evaluations, designed by the National Council's MHFA Research and Evaluation Team, align with course objectives and Kirkpatrick's Four Levels of Impact.

- Consider interviews and/or focus groups to collect in-depth qualitative feedback. Collect anecdotal evidence through success stories of individuals or groups benefiting from MHFA training and community awareness efforts.
- Track any data required by funders closely.
- Monitoring and reporting outcomes
- At a regular cadence (e.g., quarterly), monitor quantitative and qualitative metrics agreed upon by evaluation partners.
- Report out on monitoring and evaluation progress and initial findings to maintain partner and community interest as well as buy-in around the impact of MHFA implementation.

A community-based monitoring and evaluation plan that is informed by best practices is vital for driving meaningful change. Working with community partners can also create opportunities for sharing critical data — including emergency room visits, referrals to mental health services and use of local resources — that individual organizations may not have.

Ultimately, a robust monitoring and evaluation plan can lead to an effective measurement of impact, which can ultimately strengthen and support sustainable communitywide implementation.

EXAMPLE IN PRACTICE

Monitoring and Evaluation

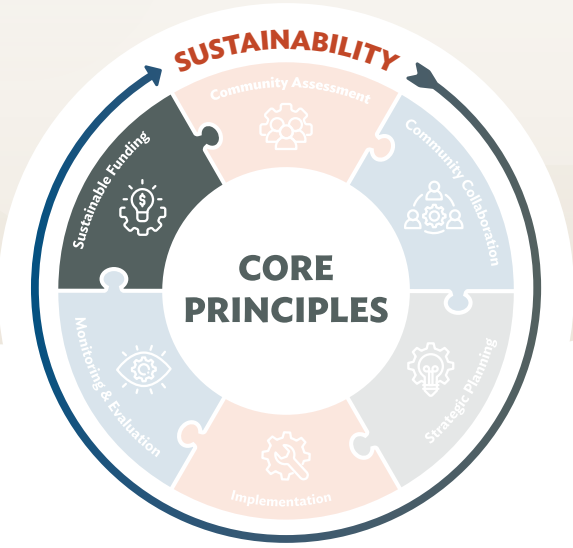
The Mental Health Association in New York State (MHANYS) has been implementing Adult, Youth and Teen MHFA programs as part of its mission for many years. Over time, the organization has refined its monitoring and evaluation practices to ensure it is effectively capturing and utilizing the data collected.

A standard practice MHANYS employs is continually assessing and identifying metrics of interest and data-collection methods. In addition to using existing evaluations provided by MHFA, the organization has supplemented its data-collection efforts to meet the reporting requirements of its various funders. For example, one funder requires reporting on long-term outcomes of MHFA training. Standard MHFA evaluations do not capture this information, so to address this need, MHANYS employed its own follow-up evaluation for Adult MHFA courses to assess outcomes. These have included use of the MHFA Action Plan, number of times a learner recognized signs of a mental health or substance use challenge, and number of referrals provided. MHANYS then uses this data to showcase outcomes to other funders and key state officials.

By collecting additional data to support its funders, MHANYS demonstrates how strategic efforts around monitoring and evaluation can be effective in showcasing the value and outcomes of MHFA implementation, which has lasting impacts on the support for the program and its long-term sustainability.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.

Sustainable Funding



> ***"A new grantmaking approach is needed — one that provides enough money for nonprofits to pay for all their operations, not just one-time programs and services."***
>
> — Eckhart-Queenan et al., 2016

Communitywide MHFA implementation requires a strategic, long-term plan and sufficient financial resources. While sustainability has been discussed throughout each core principle, it is of special focus when thinking about funding. Ensuring sustainable funding is essential to maintaining a successful program. A common challenge organizations face is relying on short-term or small grants, which can create gaps in funding. When a grant expires without having secured replacement funds, programs may experience disruptions that lead to staff turnover, loss of momentum and decreased community confidence. To avoid this, your initiative needs to diversify revenue streams and adopt a long-term financial strategy that aligns with your timeline. Given that MHFA is an early intervention program, funding must reflect this long-term commitment to addressing community mental health needs.

KEY ACTIVITIES

This section will dive into two best practices for a sustainable funding strategy:

1. Designating dedicated funding leads.
2. Identifying and diversifying funding sources.

Designating dedicated funding leads

Sustainability requires early intentional planning to build strong financial capacity. A strong first step is to identify staff members as dedicated funding leads or create a sustainability subcommittee to guide your financial strategy. This group may include members of your Steering Committee, MHFA Program Team or community partners with expertise in fundraising, grant writing or budgeting. Remember that some of these activities began during the strategic planning phase with your Steering Committee. Ensure your MHFA Program Team includes staff specifically responsible for fundraising. This task requires ongoing effort and different skills, including research, relationship building and grant writing.

Key responsibilities may include:

- Reviewing current funding options and identifying gaps or opportunities.
- Researching different sources of long-term funding, including public, private and philanthropic opportunities.
- Developing a multi-year financial plan for launch, growth and long-term maintenance.
- Collaborating with the Steering Committee to gain long-term funding support by crafting compelling cases that align MHFA with community priorities.
- Having a designated funding team or lead ensures consistent, proactive attention to funding and embeds sustainability into the program from the start. This team or lead keeps the Steering Committee informed and helps surface new opportunities and partnerships that may not be immediately visible to the MHFA Program Team.

Another essential strategy for long-term sustainability, and a potential responsibility of the funding lead, is supporting MHFA's integration into recurring organizational budgets. This might look like a school district's professional development plans or a nonprofit's annual operating budget. Budget integration means creating a line item that includes the cost of MHFA courses along with associated personnel, materials and operational costs. Embedding MHFA in this way promotes long-term institutional commitment, aligns the program with broader health or education priorities, and reduces reliance on short-term or one-time funding.

Identifying funding sources

Once you have a dedicated team or leader to ensure continuous review of funding strategies, your next step is to understand the range of funding options available — and their nuances — to secure financial support for your MHFA initiative.

Grant funding

Grant funding is one of the most common sources of financial support for mental health initiatives. Many foundations, government agencies and nonprofits offer grants geared toward mental health education and support programs. You should proactively research and identify funding opportunities that align with your initiative's goals. It is essential to focus efforts on opportunities with a high likelihood of success, which requires thorough research on potential funders.

Grant proposals must clearly describe your initiative's goals, population(s) of focus, community impact and budget. You should include data supporting your program initiative's effectiveness to strengthen the case for funding. Refer to MHFA's Funding Opportunities webpage and Grant Writing FAQs for detailed guidance on crafting successful proposals. Community Tool Box also provides information on applying for grants (Center for Community Health and Development, n.d.-a).

Collaboration with your Steering Committee is vital when seeking grant funding. Given the competition for mental health resources, demonstrating the strength of your community partnerships can enhance your credibility with potential funders.

Corporate sponsorship

Corporate sponsorship is another valuable funding source. Many businesses are interested in supporting community health initiatives as these efforts align with their corporate social responsibility goals. Organizations can attract sponsors by offering benefits such as branding opportunities at events, promotional materials and co-marketing efforts.

Building and maintaining strong relationships with local businesses is key to securing sponsorships. Sponsorship agreements often take time to develop — anywhere from six months to two years — so patience and consistent engagement are essential. Communicating your initiative's value and the impact of corporate support will help foster long-term partnerships.

Donor cultivation

In addition to identifying potential donors, it is important to recognize that the donor cultivation cycle plays a significant role in building strong, long-term funding relationships. It begins with identifying and researching funders whose priorities align with your initiative and maintaining an updated pipeline of prospects. Next, you cultivate these relationships by helping potential funders understand your mission, goals and impact. Once trust is established, you make a tailored solicitation that reflects the funder's interests. After securing support, maintain stewardship and continued engagement through timely acknowledgments and regular updates on your initiative's outcomes and impact.

Local fundraising

Local fundraising activities such as walks, runs or mental health awareness fairs can help generate funds and understanding of your MHFA initiative. Engaging community groups, schools and volunteers in these events can foster a sense of ownership and support for your initiative. However, these efforts require significant time and resources and may yield modest financial returns. Therefore, you should plan fundraising events thoughtfully within the context of your broader funding strategy.

Social media can also help amplify local fundraising efforts by broadening outreach and encouraging donations. Crowd funding campaigns, supported by compelling stories about the importance of MHFA, can also be an effective way to raise funds and engage the community.

Fee-for-service model

A fee-for-service model helps distribute MHFA operational costs and can offer a sustainable revenue stream. Charging a nominal fee for MHFA certification courses allows organizations to cover operational costs while maintaining affordability. Offering sliding scale fees or scholarships ensures accessibility for those in need. To understand the overall program budget, refer to the budgeting section of Core Principle: Implementation.

The National Council provides resources for establishing a sustainable MHFA Instructor program, including pricing strategies, managing expenses and finding consistent teaching opportunities. The guide offers practical advice on diversifying funding sources and balancing financial sustainability with accessibility.

Legislative support

Some states have successfully secured appropriated funds to support their MHFA initiatives, demonstrating how policy action can strengthen long-term sustainability. Because each state's legislative and political landscape is different, we encourage you to review your state's political environment to inform investment in this area accordingly. Some organizations collaborate with partners who have the capacity and expertise to lead or support advocacy efforts. Exploring these opportunities can help advance mental health education initiatives and potentially unlock public resources to sustain your MHFA efforts. For guidance on how to approach advocacy, refer to the MHFA Advocacy webpage.

In some states, state or federal funding sources that align with MHFA-related activities, such as care coordination, parent engagement or behavioral health outreach, may provide opportunities to support implementation. Your funding lead can partner with relevant district or state contacts to determine whether these funding pathways are available in your state.

Securing sustainable funding is crucial to your MHFA initiative's success and longevity. When you have dedicated funding leads and diversify your funding sources to include grants, corporate sponsorships, local fundraising, donations and fee-for-service models, you create a healthy financial framework appropriate for your unique goals. Given the long-term nature of MHFA's goals, prioritizing sustainable funding methods is not just a necessity — it is a responsibility to build healthier, more resilient communities.

EXAMPLE IN PRACTICE

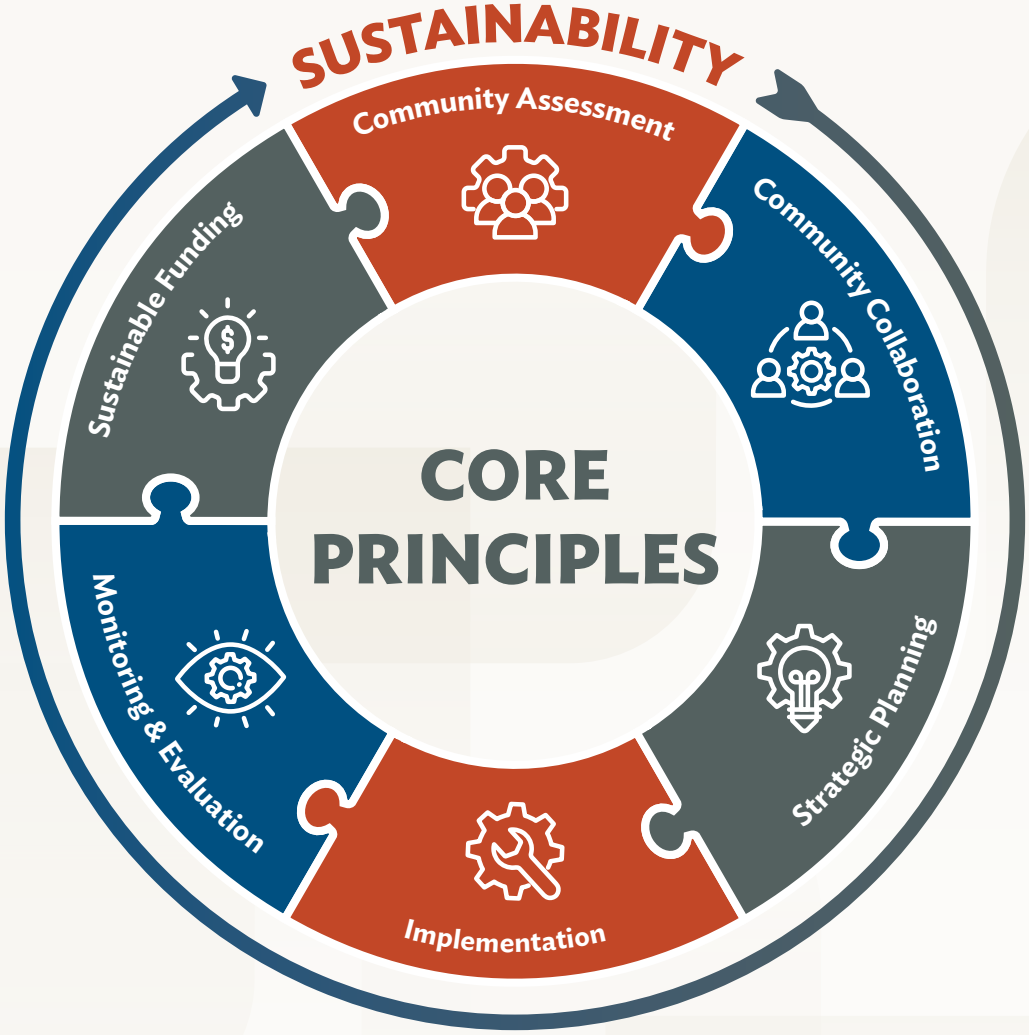
Sustainable Funding

In 2023, the Colorado Behavioral Health Council (CBHC) piloted a fee-for-service model. CBHC partnered with WellPower to establish a structured training fee and launched a public-facing request form that includes a question about the requester's training budget. Rather than charging a flat rate, CBHC implemented a pricing structure designed to cover all associated costs, including Instructors, National Trainers and program coordination, as well as a per-participant fee based on the National Council's Participant Processing Guides, Manual rates and additional training materials.

Through this process, CBHC learned the importance of prioritizing relationships with contractors and engaging in transparent conversations with organizations seeking to understand the rationale behind the fees. The team intentionally created flexibility for organizations that want to offer MHFA to their communities but require adaptable pricing. Although there was initial uncertainty at the outset of the fee-for-service pilot, CBHC has since experienced consistent growth and increased investment in the program.

In the first year of implementation, CBHC generated nearly $20,000 in revenue. Building on that momentum, the organization established performance metrics and growth targets and generated $22,000 in revenue in the second year. This new revenue stream produced unrestricted funds that were reinvested into operations, including marketing, Instructor support, program coordination and long-term infrastructure. CBHC's experience highlights the value of appropriately pricing time and expertise (as well as that of partners), communicating transparently about costs and maintaining flexible funding approaches to support long-term program sustainability.

Not sure where to start or need support on your implementation journey? Reach out to Consulting@TheNationalCouncil.org to discuss your organization's needs, availability, and budget.



Conclusion

Thank you for exploring the Communitywide MHFA Implementation Road Map!

Let the six core principles outlined in this Road Map serve as a guide throughout your journey implementing MHFA throughout your community. As you move forward, continue fostering collaboration, planning strategically and prioritizing sustainability to ensure lasting impact. By embracing the core principles, you're helping create a community better equipped to support mental health and empowering individuals to make a meaningful difference.

Successful communitywide implementation involves broad participation from sectors such as education, health care and local leadership, ensuring that MHFA becomes a sustainable, integrated part of community priorities. This leads to improved mental health literacy, reduced stigma and greater empathy. It enhances access to mental health resources and early intervention while encouraging engagement and establishing trusted partnerships aligned in creating supportive communities. In the end, a successful MHFA initiative results in better mental health outcomes, fewer crises, and communities where individuals are empowered to support people experiencing mental health and substance use challenges and connect them to appropriate care.

Glossary

- **Capacity Planning Tool:** This supplemental tool helps assess readiness for communitywide MHFA implementation by providing space to review the status of each core principle and reflect on areas needing further support.
- **Community Engagement:** This is a collaborative process where groups of people — connected by geographic location, shared interests or common challenges — work together to address issues affecting their wellbeing.
- **Community Impact:** This refers to the intentional and systematic creation of positive social change that addresses priority needs within a community. It involves measurable improvements in areas such as mental health, education and community resources, leading to a stronger, more resilient community.
- **Communitywide MHFA:** This term refers to the large-scale implementation of MHFA across regions (e.g., cities, states) or communities (e.g., veterans across Texas) with cross-sector stakeholders uniting and forming partnerships around a shared vision.
- **Collective Impact Model:** This framework helps to solve complex social issues through coordinated cross-sector collaboration. It focuses on five core components: a common agenda, shared measurement, mutually reinforcing activities, continuous communication and a backbone support organization.
- **Core Principles:** The Road Map contains six core principles, the foundational concepts to guide successful implementation. The concepts require ongoing attention and should be continuously addressed. Each contains two to five key activities.
- **Evaluation:** In monitoring and evaluation, evaluation focuses on measuring overall initiative outcomes and effectiveness. Evaluation also provides insights into future enhancement opportunities and sustainability.
- **Indicators:** In monitoring and evaluation, indicators are measurable criteria used to track a program's progress and effectiveness and to guide decision-making. Examples of MHFA indicators may include improvements in learners' mental health knowledge, changes in stigma, application of learned skills and program reach.
- **Key Activities:** Each core principle in the Road Map contains two to five key activities for consideration. Successful completion of each key activity indicates a strong foundation for communitywide MHFA implementation.
- **MHFA Champion:** A community leader who advocates for MHFA, promotes collaboration and fosters engagement. Champions play a key role in integrating MHFA into broader mental health strategies and ensuring the communitywide initiative's long-term success.
- **MHFA Program Team:** This group is responsible for the practical execution of MHFA initiatives within the community and helps ensure that the strategic plan set by the Steering Committee is implemented effectively. The MHFA Program Team typically includes MHFA initiative leads, Instructors, Coordinators, and monitoring and evaluation leads.

- **Monitoring:** In monitoring and evaluation, monitoring involves continuous collection of data to ensure activities are on track and align with goals and indicators. Monitoring is vital to understanding implementation progress and identifying changes so that you can adjust as needed.
- **Steering Committee:** A Steering Committee is a group of cross-sector representatives, which may include MHFA Coordinators, government representatives, community leaders and MHFA champions, who provide strategic oversight and guide the MHFA initiative. The Steering Committee focuses on governance, sustainability and overall program direction.
- **Legislative Appropriations:** Legislative appropriations refer to government funding allocated by federal or state legislatures to support MHFA initiatives. These funds can be used for Instructor training, community outreach, coalition-building and the integration of MHFA into broader mental health initiatives. Legislative support ensures the scalability and sustainability of MHFA initiatives by providing necessary financial resources.

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