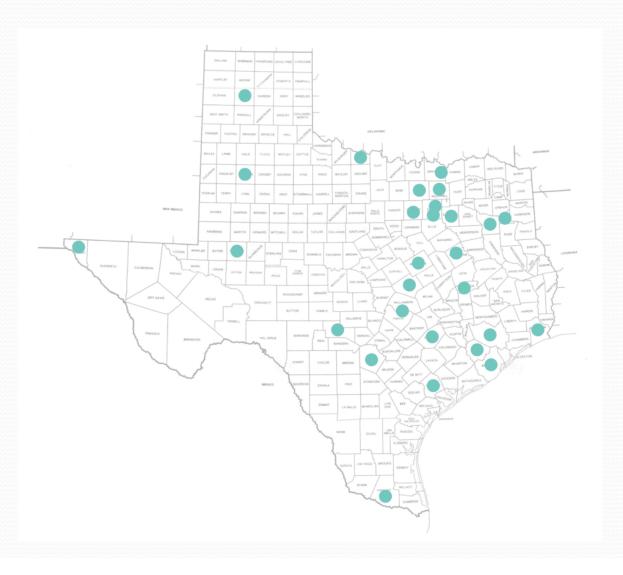
Preparing NAMI Affiliate Start-Ups for Success With Standards of Excellence

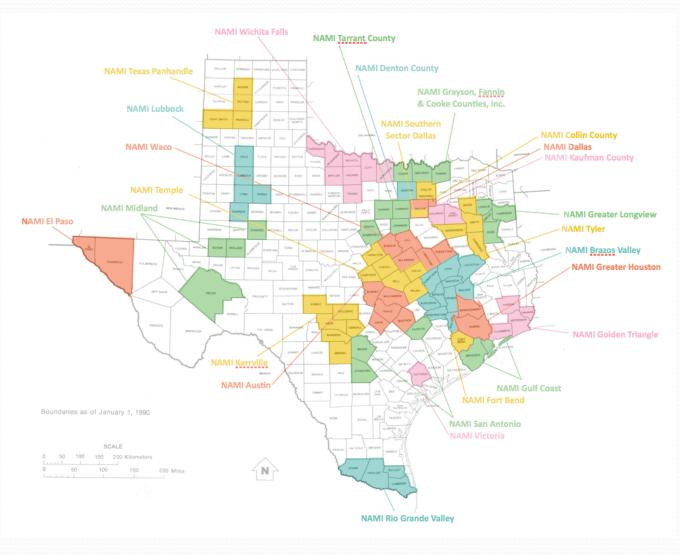
NAMI Texas: Initial SOE Alignment & Affiliate Start-Up Processes

Stacy Hollingsworth, PMP, CSM Consultant NAMI Texas

NAMI Texas Affiliates (2014)



Affiliate Service Areas (2014)



Benefits of Affiliate Service Areas

- Facilitate clear communication between NAMI Affiliates and NAMI State Organization
- Enable more accurate data collection for funders and the general public
- Make underserved areas of the state more distinguishable
- Minimize competition among Affiliates for resources

Alignment of Affiliate Start-Up Process to Operational Models

Stages of Affiliate Development	Operational Models	
Stage 1	(none)	
Stage 2	Model B	
Stage 3	Model A OPTION	AL

STAGE 1

Affiliate Start-Up Process

- Exploratory stage prior to devoting more time and resources to the new Affiliate Start-Up group
- Initiates the relationship between NAMI State
 Organization and the prospective NAMI Affiliate
- NAMI State Organization available for guidance, but most of the steps are addressed at the local level
- Relatively quick and easy stage
- Mainly devoted to items on NAMI's Application for Obtaining Affiliate Status

STAGE 2

Affiliate Start-Up Process

- Officially recognized as a Model B Affiliate
- Begin using official logo, offering programs, managing memberships, tracking expenses, etc.
- Work on Standards of Excellence items commences
- When Model B Standards of Excellence items have been completed and approved, Affiliate goes up for a state-level endorsement vote followed by a national re-affiliation vote

STAGE 3

Affiliate Start-Up Process

- Optional to transition to a Model A Affiliate
- Follow the list of checklist items, which include submitting application to become a 501(c)(3) organization, filing IRS 990 Forms, obtaining separate insurance, etc.
- When Model A Standards of Excellence items have been completed and approved, the Affiliate goes up for a state-level endorsement vote followed by a national re-affiliation vote

Affiliate Start-Up Packet





- arms.

 If you will transition to becoming an independent, 501(c)(3), Model A NAMI Affiliate, work with NAMI Taxas to make that transition after all other items are addressed in Stage 2.

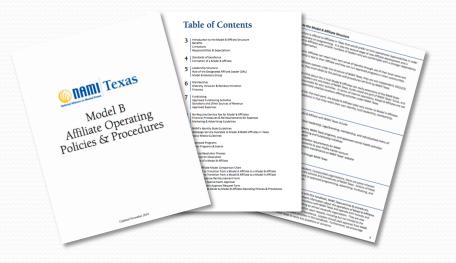
ONAMI Texas

save read the above statement and agree to abide by all of the terms.	
filiate Start-Up Group Location:	
larre:	
ignature:	Date:

National Alliance or	Ami Texas
	exas (National Alliance on
	ess - Texas) is establishing an a this region. Join us at the
upcoming	Interest Meeting to share
your th	oughts and suggestions.

Model B

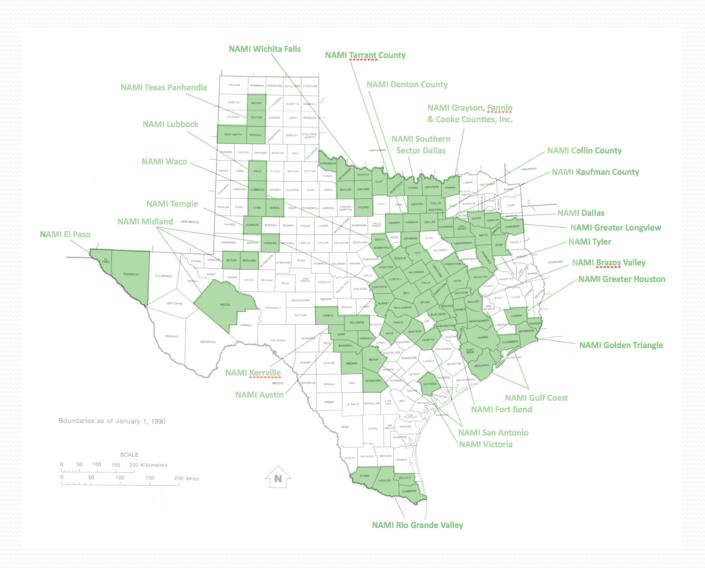
Operating Policies & Procedures



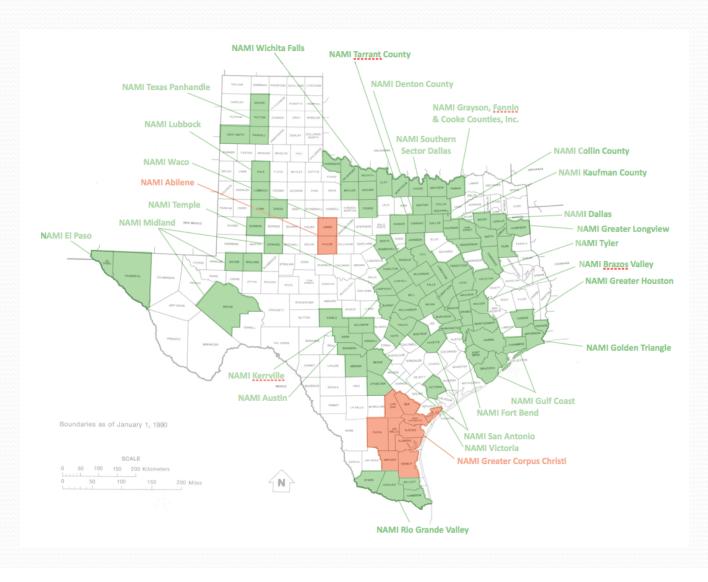
- Overview of Model B Structure
- Standards of Excellence Expectations
- Leadership & Advisory Groups
- Membership & Nondiscrimination
- Fundraising & Finances

- Marketing & Communications
- Programs & Events
- Dispute Resolution Process
- Checklists & Approval Forms
- Agreement to Follow Operating P&P

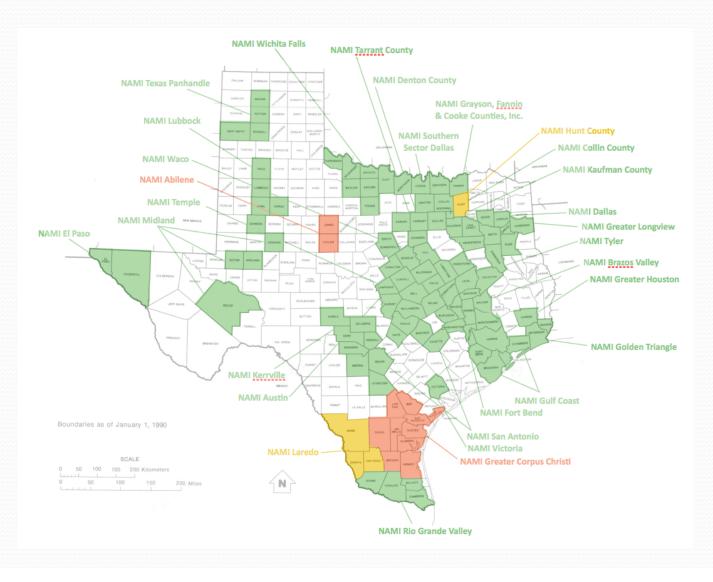
New Affiliate Growth



New Affiliate Growth



New Affiliate Growth



Supporting New Affiliates Through Standards of Excellence

- Financial and strategic support from NAMI Texas, as well as guidance from NAMI
- Templates, progress reports, and assistance with more challenging items
- Profile Center uploads on behalf of new Affiliates
- Since the emphasis for new Affiliates is on creating initial materials, it is typically a smoother process as compared to our work with existing Affiliates

NAMI Texas: Rationale, State Resources, and Ongoing Operations

Holly Doggett
Executive Director
NAMI Texas

How Texas Started

 Honestly? I didn't know that wasn't how it was supposed to be done!



- I was a new NAMI State Organization Executive Director, trying to understand affiliation, SOE, and the state's role
- As I was talking with volunteers in Corpus Christi about affiliation, I just naturally talked about SOE, as well
- It seemed like a natural process to "blend" the two components

It Makes Sense

- When working with an emerging Affiliate, we are putting in time, energy, and resources as they go through the affiliation process
- When we are working with existing Affiliates who need assistance with the Standards of Excellence process, we are also putting in time, energy, and resources
- By incorporating the SOE process into the affiliation process, we not only save time, energy, and resources for the state organization—we do the same for the Affiliate
- Working with both aspects at the same time allows us to provide a higher level of support to the Affiliate—we are not duplicating staff hours

State Level Resources

- A clear process of how this works
- Support materials Affiliate start-up guide
- Staff for us, our SOE consultant is a key to the success of the program
- A positive attitude
- Funding from both our operations budget (Affiliate outreach and support) and grants (MHM and Meadows)



The Day to Day - Accounting

- NAMI Texas manages the finances and accounting for Model B Affiliates.
- Each Affiliate has an account in our QuickBooks system.
- We provide monthly reports for our Affiliates.
- All Model B Affiliate funds are held in the NAMI Texas bank account.
- We pay bills on behalf of the Affiliates, either directly to vendors or via a reimbursement request system.



The Day to Day - Insurance

Model B Affiliates are covered under NAMI Texas'
 D&O and general liability insurance plans



The Day to Day - Membership

- For Affiliates in the start-up phase, memberships are placed in a NAMI Texas virtual Affiliate.
- NAMI Texas processes these memberships.
- Once the Affiliate is officially recognized, their memberships are transferred to their Affiliate.



- Each Affiliate is then responsible for designating someone to be trained on NAMI360 and manage the Affiliate's membership.
- NAMI Texas is available for back-up and tech support.

The Day to Day - Materials

• NAMI Texas places orders for materials for the Model B Affiliates, and then charges the cost to their internal account.



NAMI Greater Corpus Christi: An Affiliate Journey

Jim Hall & Angela Horner Affiliate Leaders NAMI Greater Corpus Christi

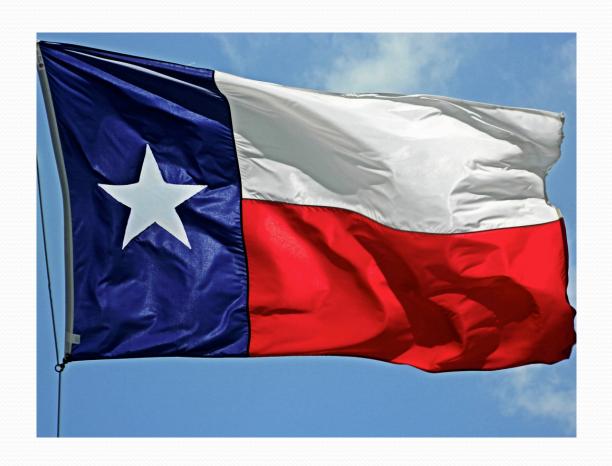
In the Beginning



By This Name Ye Shall Be Known



NAMI Texas



Knowing the Territory



Selling the Cause



Meeting the Local Professionals



Initial and Future Funding

\$\$\$\$\$

Monthly Support and Interest Meetings



Publicity and Media



The National Alliance on Mental lilness now has an affiliate chapter in Corpus Christ. NAMI serves individuals working on their recovery and families and caregives of a loved one with mental illness. The new group offers on a love of the control on a second one want mental massis. The new group offers ongoing support groups, monthly public meetings, and a

12-week family education course.

AMI is the largest grassroots mental health organiNAMI is the largest grassroots meet individuals and
station dedicated to improving the lives of individuals and
strailless affected by mental liness. NAMI headquarters
are in harmon Virginia with state chapters in 49 states
and Washington I/C plus Canada, Mexico, and Isbly. There
are over 1,100 affiliate groups in communities like Corpus
Christi across the country which engage in advocacy, reare over 1,100 artiliate groups in communities like Corpus Christi across the country which ergage in advocacy, for a support, and education. NAM Texas is located in Austria, and Texas has 27 affiliate chapters. Members of NAM are furtilles, trientle, and twents living with munical Austin, and Texas has 27 attiliate chapters. Members of NAMI are families, friends, and people living with mental tilness such as major depression, schizophrenia, bipolar discorder, obsessive-compulsive disorder, panie disorder, and the properties of the prope r, onsessive-computative amorier, pagae associat, mutic stress disorder, and borderline personality

In existence one year, the group holds open informa-In existence one year, the group mone open automative meetings at Bayview Behavioral Hospital Gymansium on the 3rd Thursdays of the month, 629 Wooldridge um on the 3rd Thursdays of the month, 6639 Wooldridge Road, 6:30 PM. Speakers from area mental health groups general relevant topics, literature and refreshments are securitable.

avaitable.

NAMI Connection, support groups for individuals NAMI connection, support groups for individuals working on recovery, meets at Family Courseling Services, SEGS S. Staples, room 218, at 6 PM on 2nd and 4th Unchamburloom. Wednesdays. Another NAMI Connection support group for individu-

and is need is assessed the tribage as our lasty of respectively. Help, satellite activity building, 5830 Williams St., of 7 PM. For families, caregivers, friends, and significant others

For families, caregivers, friends, and significant others of a loved one with normal illness, a Family Support Group is held the lost and Sad Fridays at 7 pM in satellite building this location, it is possible for families and caregivers in attendancy group to more recome white the individual recovery susport group in one recome white the individual recovery susport group in one recome white the individual recovery susport group in our recome white the individual re-

attend support group in one room while the individual re-covery support group meets in an adjacent room. These support group provide families and indi-viduals in recovery with an understanding environment within which to show their excentences over such some within which to share their experiences and gain insight. within which to share their experiences and gain insign.

from others in similar circumstances. All groups are
they trained facilitators with lived experience. All are volny commun carantagors want used experience. At are vol-minteers. All programs are free. Walk-ins are welcome, All discussions are confidential.

discussions are confidential.

In addition to the popular support groups and general.

In week, SAMI Greater Corpus Christi also offers a free leavest, SAMI Creater Corpus, Christi also offers a free leavest, SAMI bear custum, Pamily to Family, for family, leavest, SAMI bear corpus and friends of a broad concept, seemed. 12-week, 2-1/2 hour course, rammy to rammy, for same lies, caregivers and friends of a loved one with mental nes, caregivers and friends of a foved one with mental illness. In this NAMI signature program, participants of cuss topics such as: crisis management, effective concuss topics such as: crisis management, enecuve continuitation, problem-solving, self-care, stress manage nunucation, promem-sorving, sen-case, success manager ment, finding and using local support services, facts on ment, finding and using local support services, facts on mental health, current treatments, therapies, medication and side effects. This course is taught by trained family and since ejects. 1115 Course to saugur oy manieta many necessary for this class as class size is limited to 20. NAMI is currently holding its third Family to Family

Coastal Bend Medicine 11



MAMI Greater Corpus Christi

NAMI Greater Corpus Christi, NGCC, is a newly formed Affiliate of NAMI Texas, www.nar status in December, 2015, NAMI GCC will hold general meetings on the third Thursdays of the month at 6:30 p.m. at Bayview Behavioral Center, 6629 Wooldridge Rd. These meetings are open to the community and will feature informative speakers. NGCC will participate in area mental health events; will hold education and support groups; train volunteers to lead groups and classes; and become informed on mental health advocacy issues. The Affiliate has been chartered to include Nueces, Aransas, Bee, Brooks, Duval, Live Oak, Iim Wells, Kenedy, Kleberg, and San Patricio

illness, their families, and friends.

About Mental Illnes

Affiliates

NAMIWALKS

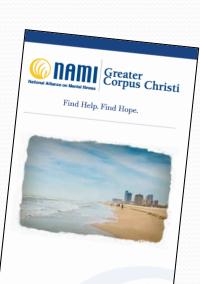
OW NAMI TEXAS

N SMILE

- NAMI Family-to-Family Education Program a 12-week, 2 1/2 hour free education course for family members, caregivers, friends, and significant others of a loved one with mental illness. Please register for the next course at mail.com with your name, email, and phone number and you will be contacted by Jim, (281) 300-3837, or Angela, (361) 452-4227.
- NAMI Connection Peer Support Group a support group for individuals working on recovery with mental illness Free. No registration required. For more information, contact Angela at (361) 452-4227 or Jim at (281) 300-3837.
- Every 2nd and 4th Wednesday evening from 6 p.m. 7:30 p.m. at Family Counseling Services, Room 218, 3833 S. Staples St., Corpus Christi, TX 78411
- Every 1st and 3rd Friday from 7 p.m.-8:30 p.m. in the Satellite Youth Activities Center at Our Lady of Perpetual Help Church, 5830 Williams Drive, Corpus Christi, TX, 78412
- Free. No registration required. Meetings are held first and third Fridays 7 to 8:30 p.m. at Our Lady of Perpetual Help Church, 5830 Williams Drive, Corpus Christi, TX, 78412. Park in front of Parish Hall and follow the NAMI signs to the portable building behind the Hall. No registration required.

Free, open to the public, every third Thursday evening, 6:30 to 8 PM, at Bayview Behavioral Center Gymnasium, 6629 Wooldridge Rd., Corpus Christi TX, 78414. Snacks provided. No registration needed





NAMI Greater Corpus Christi provides education, support, & advocacy for people living with mental illness and their families and friends

Membership is #1



Essential Building Blocks – Let the Classes and Support Begin!



Lessons Learned



Angela "Angel of All Trades"



Program Director & Membership But More



More!!



What's Next?



NAMI: Strategic Direction and Updates

Lynne Saunders Director, Technical Operations NAMI



As NAMI State Organization leaders continue to support Affiliates through the Standards of Excellence process, we examine ways in which to integrate these Standards into your overall start-up process.

Start-Up



Affiliation



Re-Affiliation

Why does a new Affiliate just affiliated by NAMI need to go through re-affiliation?



The Affiliate must be officially recognized by NAMI before going through re-affiliation

Affiliation

- An Affiliate must apply for permission to use the NAMI name
- Register that name
- Receive a NAMI-created Affiliate logo
- Affiliate is registered on the NAMI website under "Find Your Local Affiliate"

Re-Affiliation

- Re-affiliation ensures that all Model A Affiliates in Texas comply with nonprofit requirements and are on the path for benefits that are afforded to other charities such as the legal right to solicit and accept donations and apply for state and federal tax exempt status
- A new Model B Affiliate has far fewer requirements to meet as it goes through re-affiliation.

From the start a new Affiliate has been working towards re-affiliation using the re-affiliation process to know what is needed and is positioned to move through re-affiliation much quicker soon after receiving official Affiliate status.



NAMI Strategic Plan 2015-2019 NAMI Strategic Driver #5 – Strengthen the Organization

GOAL: Support and Strengthen State Organizations and Affiliates Through Re-Chartering, Re-Affiliations and Building Toward Consistent Standards of Excellence

Re-Affiliation – Why It Is Important

- Re-affiliation strengthens the NAMI brand, which can broaden our reach
- Re-affiliation reinforces NAMI's credibility, which can increase access to resources
- Re-affiliation strengthens NAMI's political clout, which can expand our advocacy voice
- Re-affiliation builds a stronger NAMI alliance

113 Affiliates Have Completed the Process!

- Model A: 81
- Model B: 30
- Model C: 2



- 37 State Organizations are engaged and have made at least one endorsement
- 21% of the national membership is held in reaffiliated organizations
- 5 NAMI State Organizations and their Affiliates are completely done with reaffiliation
- NAMI Greater Corpus Christi is the first <u>new</u> Affiliate to complete the process.

NAMI Denton County



Thanks for joining us!

To view our online workshop toolkit, please visit the following link:

https://namitexas.org/soe-workshop-toolkit/