How to Complete the Re-Affiliation Process

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Field Capacity & Governance Team
What are Standards of Excellence?

“mutually agreed upon standards of operation”

NAMI Leaders and members have been working together to craft the mutually agreed upon standards of operation as NAMI’s 2007-2010 Strategic Plan required.
Re-Affiliation Progress
NAMI Affiliates Endorsed by NAMI
Since Convention 2014

- 2014: 1
- 2015: 18
- 2016: 57
Where do you think you are in the process?

- Show of hands – your state is just getting started
- Show of hands – your state has been working with affiliates and has some state endorsements
- Just Getting Started
  - Review the 10 Things You Need to Know About Re-affiliation Sheet
  - Walk through some of the resources on www.nami.org/standards - next two slides
NAMI Standards Of Excellence

Standards of Excellence are helping us to build the NAMI brand and make NAMI the household name that leaders and members want us to be.

For the history of NAMI Standards of Excellence, see the Background on NAMI Standards.

NEW in Standards of Excellence

- NAMI has announced the 2016 Re-Affiliation Targets. Listen to the town hall call recording and download the 2016 Re-Affiliation Targets PowerPoint presentation here:
  - Listen to Susan Gaffney's call outlining the 2016 Re-Affiliation Targets
  - Download the same PowerPoint slide presentation Susan used for her call
- Updated information related to the Financial Reporting Requirements required as part of Re-Affiliation are now posted:
  - Listen to the Re-Affiliation Call with Beth Monroe, NAMI's Controller, who explains the importance of financial reporting, third-party oversight and the

NAMI State Organizations And Re-Affiliation

The chartering process has been completed in 46 NAMI State Organizations, and people in every state are working on re-affiliation, a process which launched in October 2013.

NAMI will offer tools and resources to help you plan for re-affiliation, and NAMI Affiliates in chartered states will be able to access the Profile Center and begin assembling their documentation there. NAMI staff is ready to assist chartered NAMI State Organizations with the Profile Center rollout to NAMI Affiliates.

Tools

- Read the instructions on how to set up a bank account for a NAMI Affiliate
- **Insurance Information:**
  - General Liability Insurance Information
  - Directors and Officers Insurance Information
- NAMI has developed Affiliate Endorsement Letter templates for each model that can be used by State Organizations:
  - State Endorsement Letter for Model A Affiliate
  - State Endorsement Letter for Model B Affiliate
  - State Endorsement Letter for Model C Affiliate
- Endorsement Tools:
  - Affiliate Endorsment Process Tracking Tool
NAMI State Organization is working with NAMI Affiliates and has some state endorsements

• Review How Does My NAMI Affiliate Finish the Re-Affiliation Process from the Affiliate Handbook

• Review the Documentation for Re-Affiliation Sheet
Success Stories to Share

• NAMI Wisconsin
  • 13 endorsed Model A Affiliates

• NAMI Texas
  • 7 endorsed Model A Affiliates

• NAMI Massachusetts
  • 7 endorsed Model A Affiliates

• NAMI Iowa
  • 5 endorsed Model A Affiliates
Success Stories to Share

9 NAMI State Organizations have endorsed Model B

- NAMI Delaware
- NAMI Hawaii
- NAMI Indiana
- NAMI Maine
- NAMI Mississippi
- NAMI Nebraska
- NAMI New Hampshire
- NAMI Texas
- NAMI Vermont
Success Stories to Share

NAMI State Organization Endorsed Affiliates by Size –

Under 50 members – 41
51 – 200 members - 31
201 – 400 members - 9
Over 401 members - 1
2016 RE-AFFILIATION TARGETS
**Target:** NAMI and all State Organizations will have a matching list of Affiliates that will pursue re-affiliation.

- **By July 2016** – All State Organizations must show evidence of progress
- **By October 2016** – 30 State Organizations will have matching list and 47 State Organizations will have matching list by the end of the year.

*Number of State Organizations with a clean list as of April 2016 = 21*

*Number of State Organizations actively working on a clean list as of April 2016 = 25*

*Number of State Organization with a clean list as of December 31, 2016 = 47*
**Affiliate Engagement Target**

**TARGET:** Thirty seven State Organizations will make their first endorsement by October 1, 2016. All states must have first endorsement by December 31, 2016.

As of April 2016:

- 21 State Organizations have made their first endorsement.
- 5 State Organizations unable to endorse affiliates because they do not have an Endorsement Plan.
Completion Target

Based on both the number of Affiliates in the state and the number of models being supported by the State Organization, the following percentage of Affiliates, per state, will be endorsed by the State Organization by the end of 2016:

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>25%</td>
<td>States endorsing one model for re-affiliation; 15 or fewer Affiliates</td>
</tr>
<tr>
<td>20%</td>
<td>States endorsing one model for re-affiliation; 16 or more Affiliates</td>
</tr>
<tr>
<td>25%</td>
<td>States endorsing multiple models for re-affiliation; 15 or fewer Affiliates</td>
</tr>
<tr>
<td>20%</td>
<td>States endorsing multiple models for re-affiliation; 16 or more Affiliates</td>
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</table>
## State Breakdown

<table>
<thead>
<tr>
<th>25%</th>
<th>20%</th>
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<tbody>
<tr>
<td>Delaware, Hawaii, Rhode Island, Vermont, Arkansas, Mississippi, Utah, Louisiana, New Hampshire, Iowa, Idaho, Kansas, Missouri, Wyoming, Colorado, New Mexico, Nevada</td>
<td>Alabama, New Jersey, Michigan, Minnesota, North Carolina, California</td>
</tr>
<tr>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Alaska, Maine, Nebraska, Arizona, South Dakota, Montana, Oklahoma, Connecticut, Maryland</td>
<td>Oregon, South Carolina, Virginia, Massachusetts, Indiana, Kentucky, Washington, Georgia, Texas, Illinois, Wisconsin, Florida, Tennessee, New York, Ohio</td>
</tr>
</tbody>
</table>
NEW TARGET: To incentivize states to keep their momentum up, move beyond the state endorsement completion targets, and shoot for the finish line – which is having affiliates approved by the NAMI Board.

By December 31, 2016, states achieving 80% of their affiliates endorsed will receive a tangible TBD “reward/award” to receive in January 2017 to further support their Standards of Excellence capacity building on the state and local levels.
## State Breakdown – Stretch Target

<table>
<thead>
<tr>
<th>80%</th>
<th>80%</th>
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<tbody>
<tr>
<td>Delaware, Hawaii, Rhode Island, Vermont, Arkansas, Mississippi, Utah, Louisiana, New Hampshire, Iowa, Idaho, Kansas, Missouri, Wyoming, Colorado, New Mexico, Nevada</td>
<td>Alabama, New Jersey, Michigan, Minnesota, North Carolina, California</td>
</tr>
<tr>
<td>80%</td>
<td>80%</td>
</tr>
<tr>
<td>Alaska, Maine, Nebraska, Arizona, South Dakota, Montana, Oklahoma, Connecticut, Maryland</td>
<td>Oregon, South Carolina, Virginia, Massachusetts, Indiana, Kentucky, Washington, Georgia, Texas, Illinois, Wisconsin, Florida, Tennessee, New York, Ohio</td>
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Moving Forward After Re-Affiliation

• The NAMI State Organization continues its oversight role

• NAMI will not circumvent the NAMI State Organization

• Two-way conversations between NAMI State Organization and NAMI Affiliate