Preparing NAMI Affiliate Start-Ups for Success With Standards of Excellence
NAMI Texas: Initial SOE Alignment & Affiliate Start-Up Processes

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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

<table>
<thead>
<tr>
<th>Stages of Affiliate Development</th>
<th>Operational Models</th>
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<tbody>
<tr>
<td>Stage 1</td>
<td>(none)</td>
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<tr>
<td>Stage 2</td>
<td>Model B</td>
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<tr>
<td>Stage 3</td>
<td>Model A (optional)</td>
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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
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

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Monthly Support and Interest Meetings
Publicity and Media
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.
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 re-affiliated organizations
• 5 NAMI State Organizations and their Affiliates are completely done with re-affiliation
• NAMI Greater Corpus Christi is the first new 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/