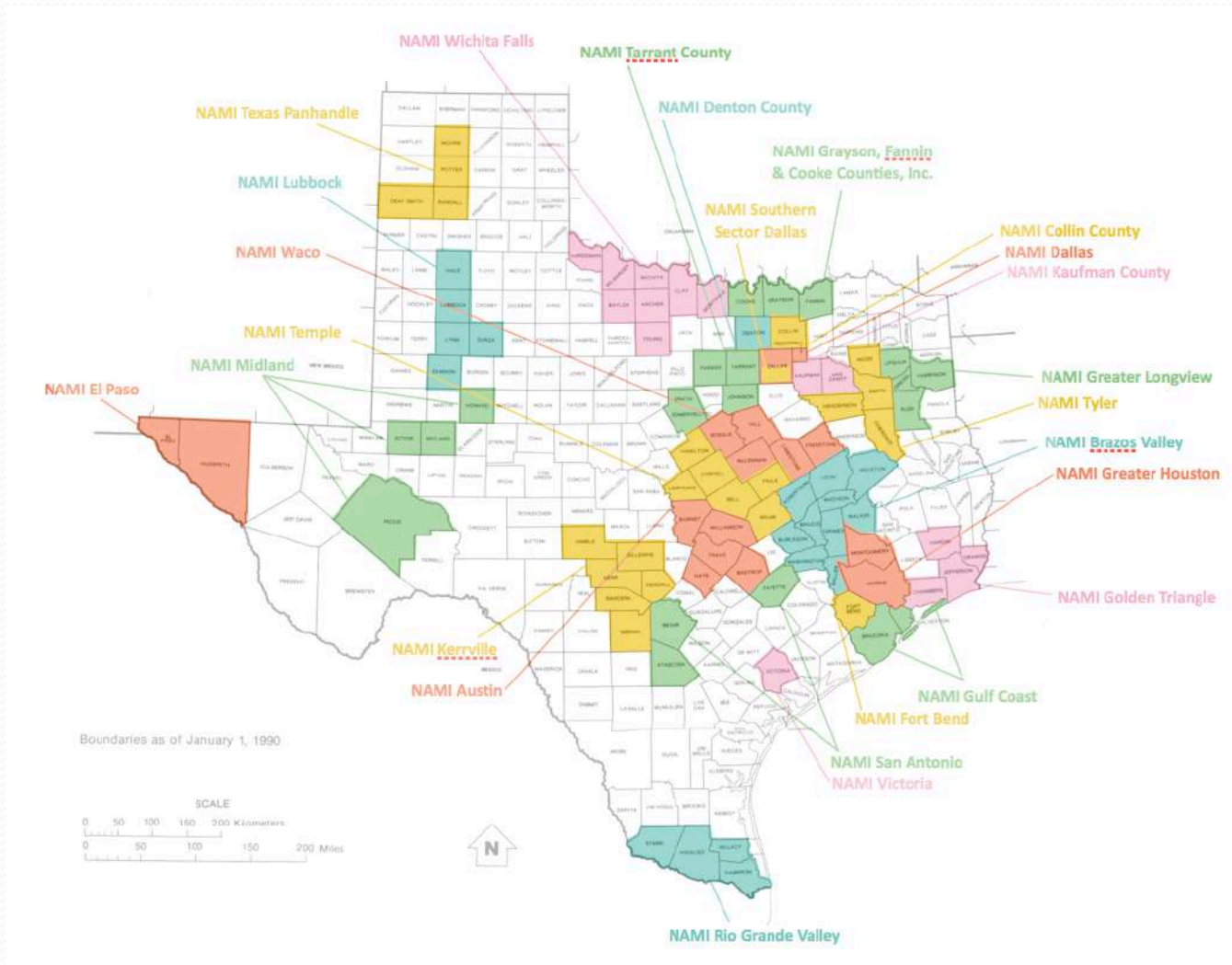


Preparing NAMI Affiliate Start-Ups for Success With Standards of Excellence

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

Stacy Hollingsworth, PMP, CSM
Consultant
NAMI Texas

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

OPTIONAL



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



Start-Up Packet to Become a NAMI Affiliate

October 2017

WELCOME

Thank you for your interest in establishing a NAMI Affiliate in Texas! We are excited about expanding NAMI's reach to areas around our state that do not currently have a NAMI presence, and we are committed to providing you with all the resources you can use to assist you throughout this process.

There are four starting points you can choose from when forming a new NAMI Affiliate: the State Office for all counties. These steps typically transform your NAMI Affiliate's identity to support Step 10 and all the members of your community who would like to benefit from our services.

Please take some time to read through this packet. Familiarize yourself with the steps in particular Steps 1-10 and jot down any questions you have. Please also note that there is a statement for you to sign, as well as forms you can use to advertise your initial meetings, located in the back of this packet. We thank you for supporting your efforts.

READY FOR STARTING A NEW NAMI AFFILIATE:

- STEP 1: State Office Meeting - Opening Under NAMI Texas**
 Meeting the local office to get information on your location. Information will include where to meet, time and a number of telephone numbers that can be contacted when not otherwise available. Provide your group's name for registration as a NAMI Affiliate.
- Application to receive recognition as a NAMI Affiliate**
- STEP 2: NAMI Affiliate Officially Recognized - Opening Under NAMI Texas**
 Your NAMI Affiliate can now begin offering official NAMI Signatures programs. You will also be able to reach your group members by using an official logo and an official telephone number to support your group's efforts, and make their presentation to become fully affiliated to NAMI.
- Application to be an official affiliate to a NAMI Affiliate**
- STEP 3: NAMI Affiliate Officially Recognized - Operating as an Independent Affiliate**
 The group will now be able to set up their own meetings, conduct their own programs, and have a logo and phone number. They will be able to set up their own meetings, conduct their own programs, and have a logo and phone number. They will be able to set up their own meetings, conduct their own programs, and have a logo and phone number.

CHECKLIST FOR STAGE 1: FORMING A NAMI AFFILIATE START-UP GROUP

- Sign the agreement including your group's proposed affiliation by NAMI Texas guidelines and procedures with each other in this packet. Present it to all sign and print it out: NAMI Texas, P.O. Box 10040, Austin, TX 78768.
- Advise the nearby meeting group in your area and NAMI meetings to general interest.
- Recruit community members to serve on your Steering Committee.
- Begin using official meeting materials of regular Steering Committee meetings.
- Make your membership to an NAMI Texas (N) members.

- If possible, visit nearby Affiliates offering NAMI Signature Programs.
- Determine your official NAMI Affiliate name.
- Submit your application for recognition as a NAMI Affiliate.

CHECKLIST FOR STAGE 2: RECOGNITION UNDER NAMI TEXAS

- Transfer your Steering Committee to a Leadership Committee
- Continue using materials of every Leadership Committee meeting
- Elect your NAMI Affiliate Member-Steering Committee
- Draft a constitution for your Affiliate's new steps
- Begin using your new official NAMI Affiliates logo in all materials and publications
- Update your contact information to reflect your new status (eg. new meeting address, email and telephone NAMI Affiliate number, etc.)
- Learn about your role in using NAMI Texas materials and resources for your Affiliate's initial meetings
- Create an email with meeting subject and address information for your efforts. Addressing mail to be officially meet to NAMI Texas, you will be applied to your Affiliate's list members
- Create an official membership list for your NAMI Affiliate
- Learn how to add your members to the NAMI 200 membership system and begin meeting registration procedures in our meetings information to your location
- Create an agreement with your NAMI Affiliate logo and membership
- Create and begin meeting your NAMI Affiliates in their meetings
- Produce a regular newsletter with at least 2 issues per year (either in print or online)
- Determine when NAMI Signatures Programs your NAMI Affiliate will offer
- Arrange to introduce members to be trained in current NAMI Signature Programs
- Begin holding at least one NAMI Signatures program in your area
- Submit quarterly address reports to NAMI Texas (transmission, program efforts, meet progress, etc.)
- Learn how to use any NAMI Texas Center event and begin expanding business opportunities in your location
- Determine local health organizations involved
- If you will remain a NAMI Texas Affiliate, ask through the Director of Operations process in this form
- If you will transition to becoming an independent affiliate, Meet a NAMI Affiliate, work with NAMI Texas to receive and maintain an affiliation with an agreement in Step 10

CHECKLIST FOR STAGE 3: BECOMING AN INDEPENDENT NAMI AFFILIATE

- Transfer your Leadership Committee to an official Board of Directors
- Continue to use meeting materials of the Board of Directors meetings
- Develop a logo for your group
- Create a Board of Directors contact list
- Establish your Website and have an official logo for use with the NAMI Texas materials
- The NAMI Texas materials will be those of those from a state of your (Director of Management)
- Submit your application to become a NAMI Affiliate
- Create your Board (Steering Committee & Procedures, including the name, mission, vision)
- Apply for recognition to your local NAMI Affiliate Recognition Committee
- Create an email to help members present to your NAMI Affiliate, based on current State guidelines
- Develop an official business card to present to your NAMI Affiliate, your division and logo account
- Complete your first meeting with an official logo and phone number to support your group's efforts, and make their presentation to become fully affiliated to NAMI
- Update your NAMI Texas materials to include a Director and General Liability
- Update your membership information to include an official logo and phone number to support your group's efforts, and make their presentation to become fully affiliated to NAMI
- Update your NAMI Texas Contact Information Letter with your Public Contact account

Once your NAMI Affiliate has completed all of the requirements on how to be a fully independent affiliate, NAMI Texas will provide you with recognition and support on your location. Official name, logo, materials, and contact information will be provided. You will be able to use any NAMI Texas materials and resources for your Affiliate's initial meetings. You will be able to use any NAMI Texas materials and resources for your Affiliate's initial meetings. You will be able to use any NAMI Texas materials and resources for your Affiliate's initial meetings.



Agreement to Establish a NAMI Affiliate Start-Up Group

I, _____, hereby confirm that I am the founding leader of the new group that is establishing in my region.

As a new group, I understand that I will be applying under the provisions of NAMI Texas. As such, we will abide by the provisions set forth in NAMI Texas' Signatures Programs and other NAMI Texas materials and procedures as required.

I understand that our group has only 1 year from the date this agreement is signed to become recognized as a NAMI Affiliate (either an association in NAMI Texas that is officially recognized under NAMI Texas or an independent affiliate). If we do not meet the requirements prior to that date, we will be able to apply for recognition status when ready.


During this first stage, our group is not considered an independent organization, so we may not receive separate materials. Our NAMI Signatures programs, which include materials, will be used to support our group's efforts.

In order to obtain recognition status, there are a series of requirements we must fulfill. Most of these are addressed in this document. However, I understand that some items, such as the creation of a constitution, additional forms may arise as the process evolves over time. If at any point we have questions about these requirements, we will address them by contacting NAMI Texas.

I understand that our group has only 1 year from the date this agreement is signed to become recognized as a NAMI Affiliate (either an association in NAMI Texas that is officially recognized under NAMI Texas or an independent affiliate). If we do not meet the requirements prior to that date, we will be able to apply for recognition status when ready.

I have read the above information and agree to abide by all of the terms.

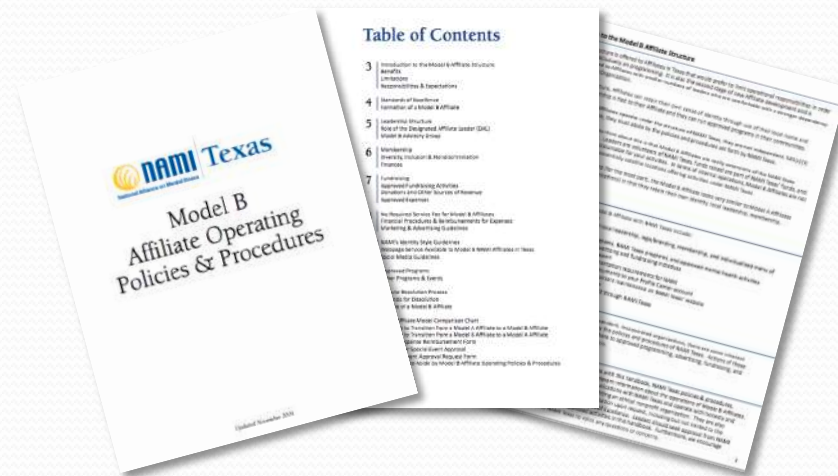
Affiliate Start-Up Group Leader:
 Name: _____
 Signature: _____ Date: _____



NAMI Texas (National Alliance on Mental Illness - Texas) is establishing an Affiliate in this region. Join us at the upcoming Initial Meeting to share your thoughts and suggestions.

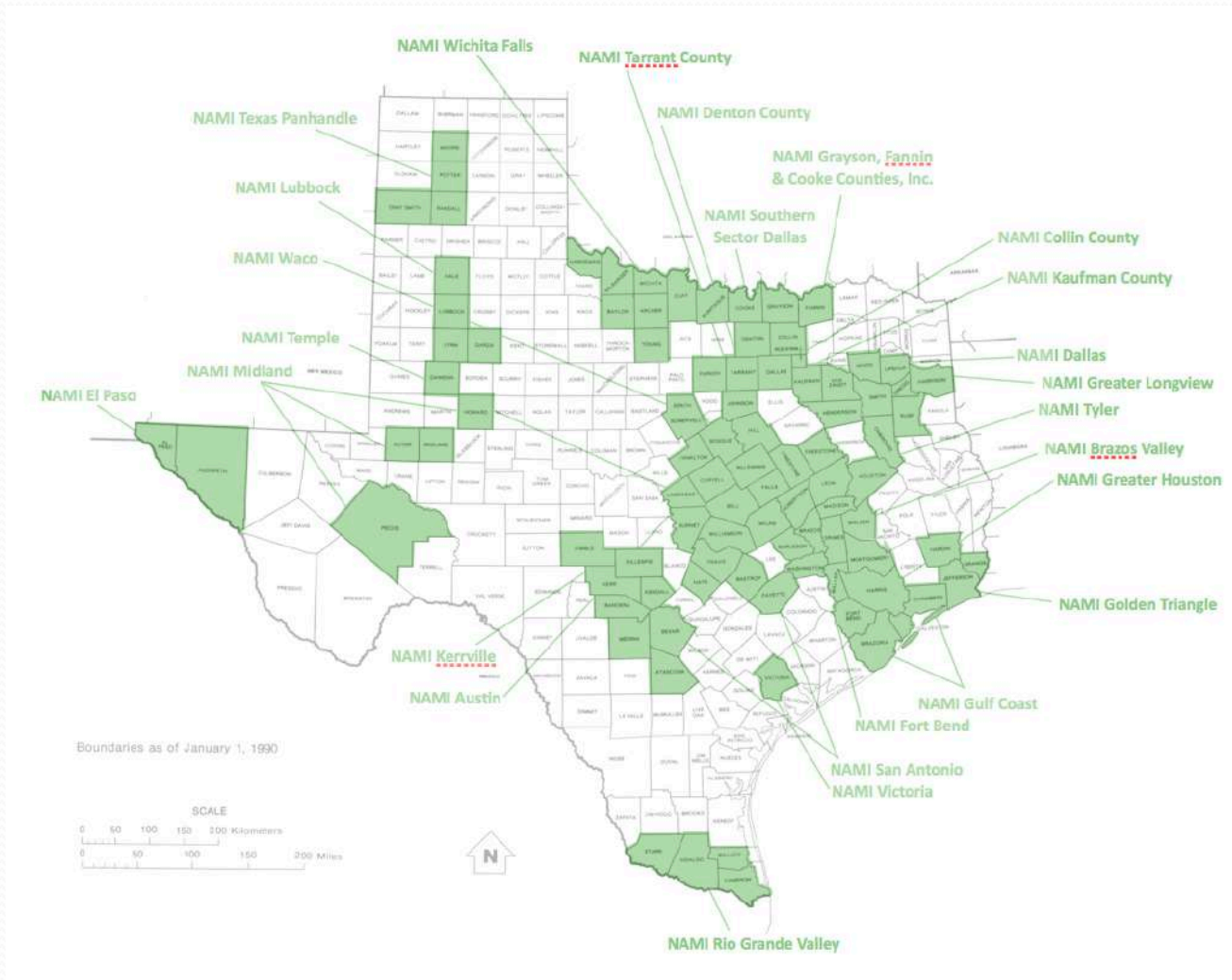
Model B

Operating Policies & Procedures

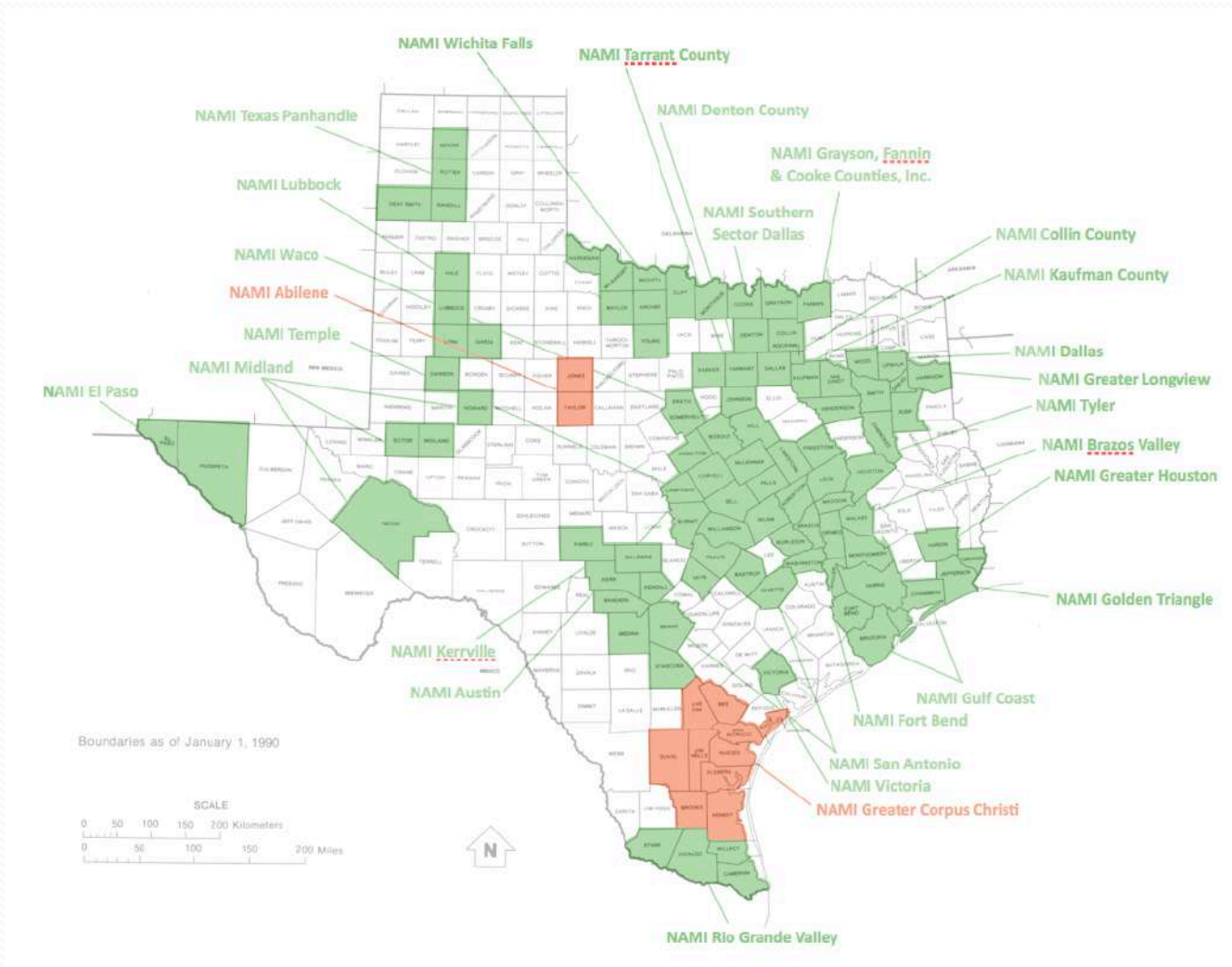


- Overview of Model B Structure
- Standards of Excellence Expectations
- Leadership & Advisory Groups
- Membership & Nondiscrimination
- Fundraising & Finances
- Marketing & Communications
- Programs & Events
- Dispute Resolution Process
- Checklists & Approval Forms
- Agreement to Follow Operating P&P

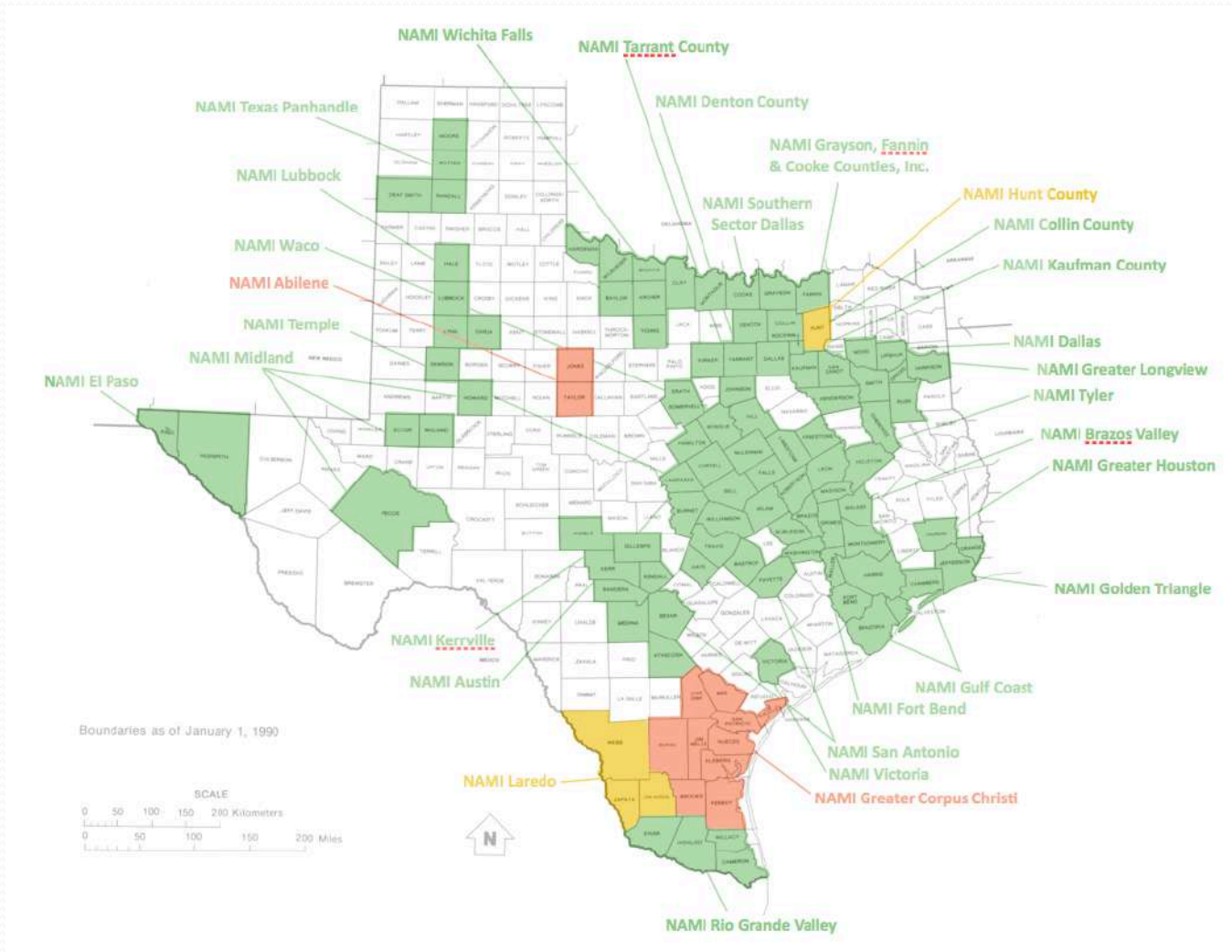
New Affiliate Growth



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)



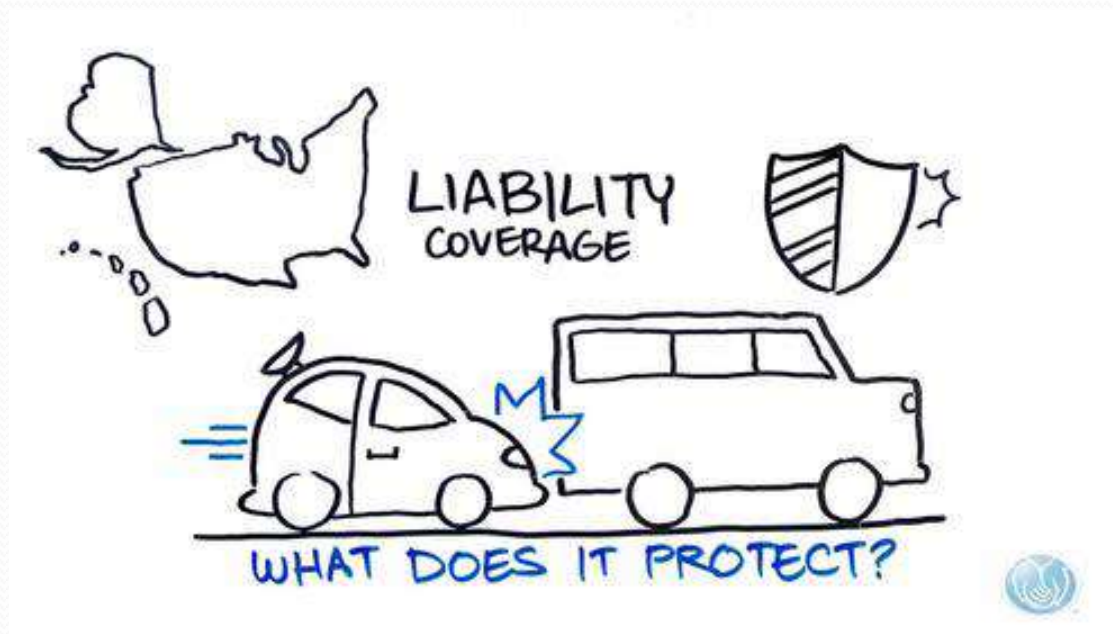
The Day to Day - Accounting

- 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

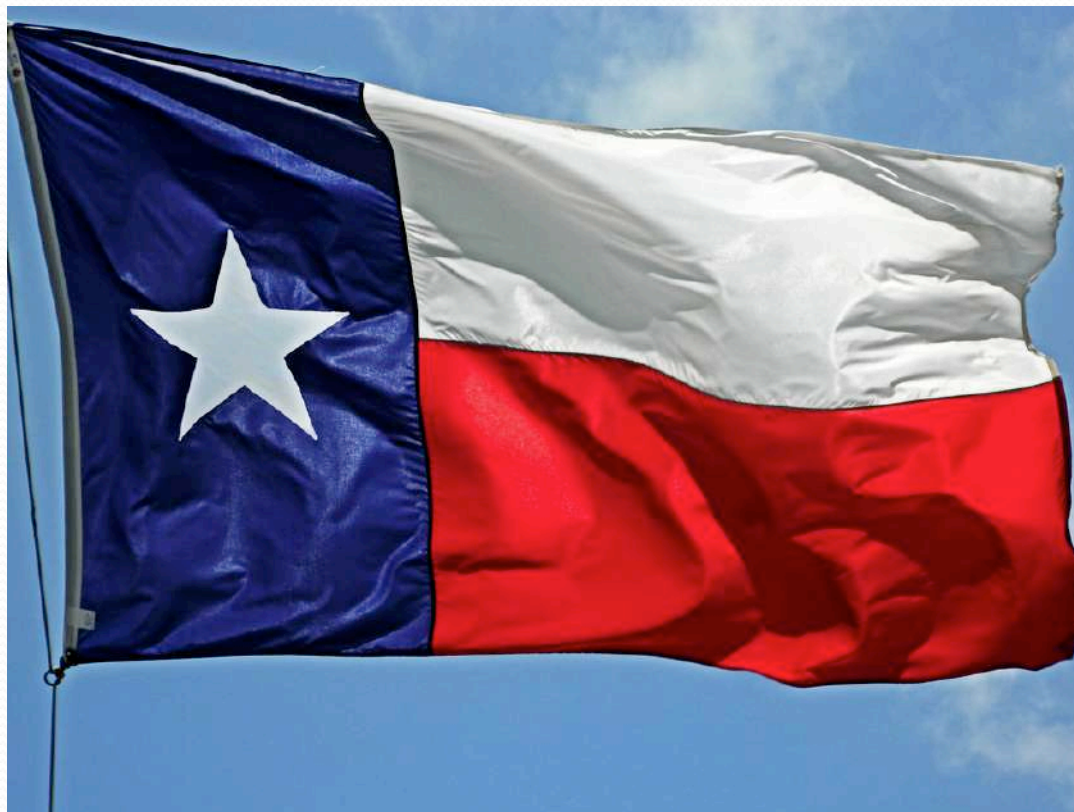


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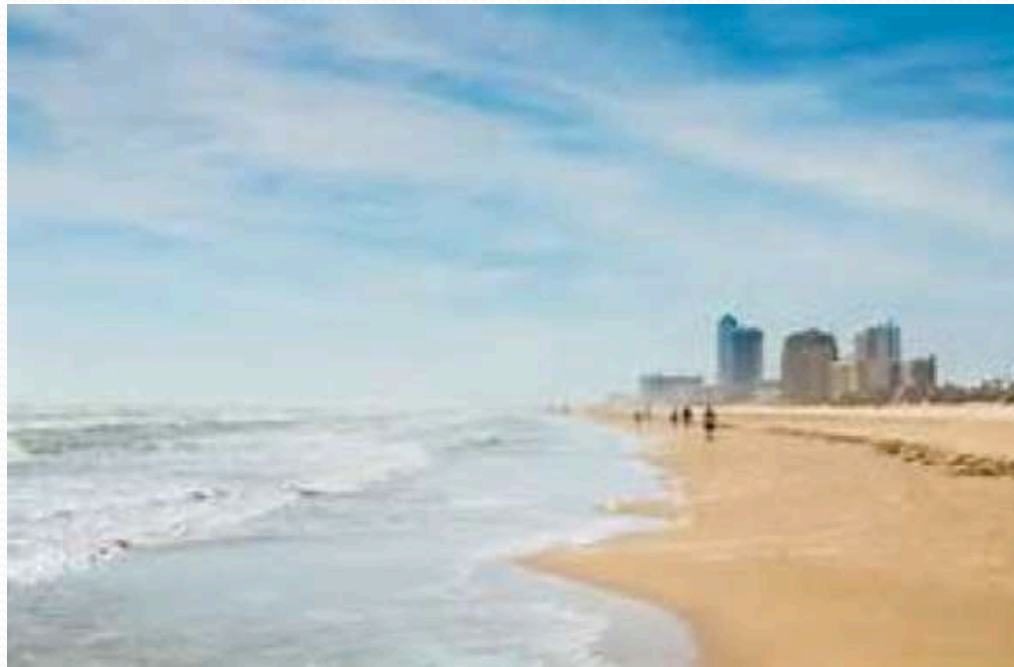
National Alliance on Mental Illness

Greater
Corpus Christi

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 Illness: New Corpus Christi Chapter Brings Hope to Area People and Family Members Experiencing Mental Illness

By Jim Hall

Jim and Diane Hall moved to Corpus Christi to retire in 2014. After meeting in college, marrying, having two children, and pursuing careers in Cleveland and Chicago, they settled in Houston in 1976. Through their lives, symptoms of mental illness repeatedly knocked on their door for many years, finally bursting during the 1990s. Years of confusion and chaos proved challenging as well as weeks of the family to the point of consideration of divorce. In desperation, a call was made to NAMI Ft. Bend, a suburb of Houston, and the rest is testament to NAMI support and education. Through raising and teaching NAMI Family to Family as well as their support group, Jim and Diane's lives expanded and so did their lives. They are fortunate to be listed in the leadership of NGCC with Andrea and Angela Horne who have welcomed them to the Hall and other NAMI Greater Corpus Christi members.

The National Alliance on Mental Illness now has an affiliate chapter in Corpus Christi. NAMI serves individuals living with mental illness. The new group offers one-on-one support, monthly public meetings, and a 12-week family education course.

NAMI is the largest grassroots mental health organization dedicated to improving the lives of individuals and families affected by mental illness. NAMI headquarters are in Arlington, Virginia with state chapters in 49 states and Washington DC plus Canada, Mexico, and Italy. There are over 1,100 affiliate groups in communities like Corpus Christi across the country which engage in advocacy, research, support, and education. NAMI Texas is located in Austin, and Texas has 27 affiliate chapters. Members of NAMI are families, friends, and people living with mental illness such as major depression, schizophrenia, bipolar disorder, obsessive-compulsive disorder, panic disorder, post-traumatic stress disorder, and borderline personality disorder.

In existence one year, the group holds open information meetings at Bayview Behavioral Hospital Gymnasium on the 3rd Thursdays of the month, 6629 Woolbridge Road, 6:30 PM. Speakers from area mental health groups present relevant topics; literature and refreshments are available.

NAMI Connection, support groups for individuals working on recovery, meets at Family Counseling Services, 3833 S. Staples, room 218, at 6 PM on 2nd and 4th Wednesdays.

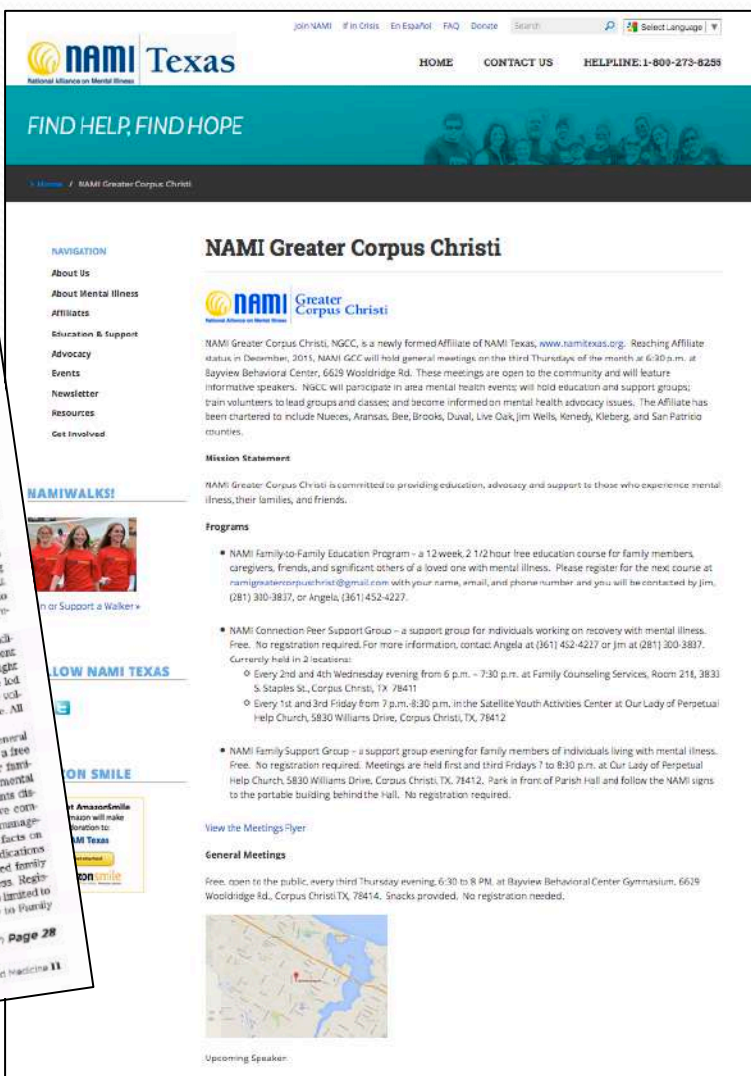
Another NAMI Connection support group for individuals is held 1st and 3rd Fridays at Our Lady of Perpetual Help, satellite activity building, 5500 Williams St., at 7 PM.

For families, caregivers, friends, and significant others of a loved one with mental illness, a Family Support Group is held the 1st and 3rd Fridays at 7 PM in satellite building #1 of Our Lady of Perpetual Help, 5500 Williams Street. At this location, it is possible for families and caregivers to attend support group in one room while the individual recovery support group meets in an adjacent room.

These support groups provide families and individuals in recovery with an understanding environment, within which to share their experiences. All groups are led by trained facilitators with lived experience. All are col-laborative. All programs are free. Walk-ins are welcome. All discussions are confidential.

In addition to the popular support groups and general meetings, NAMI Greater Corpus Christi also offers a free 12-week, 2-1/2 hour course, Family to Family, for family members, caregivers and friends of a loved one with mental illness. This NAMI signature program, participants discuss topics such as crisis management, effective communication, problem-solving, self-care, stress management, finding and using local support services, facts on medication, problem-solving, self-care, stress management, finding and using local support services, facts on medication, current treatments, therapies, medications and side effects. This course is taught by trained family members who have relatives with mental illness. Registration is necessary for this class as class size is limited to 20. NAMI is currently holding its third Family to Family

Continued on Page 28
Corpus Christi Herald



join NAMI | If in Crisis | En Español | FAQ | Donate | Search | Select Language

NAMI Texas
National Alliance on Mental Illness

HOME CONTACT US HELPLINE: 1-800-273-8255

FIND HELP, FIND HOPE

Home / NAMI Greater Corpus Christi

NAVIGATION

- About Us
- About Mental Illness
- Affiliates
- Education & Support
- Advocacy
- Events
- Newsletter
- Resources
- Get Involved

NAMI Greater Corpus Christi

NAMI Greater Corpus Christi
National Alliance on Mental Illness

NAMI Greater Corpus Christi, NGCC, is a newly formed Affiliate of NAMI Texas, www.namitexas.org. Reaching Affiliate 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 Woolbridge 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, Jim Wells, Kennedy, Kleberg, and San Patricio counties.

Mission Statement

NAMI Greater Corpus Christi is committed to providing education, advocacy and support to those who experience mental illness, their families, and friends.

Programs

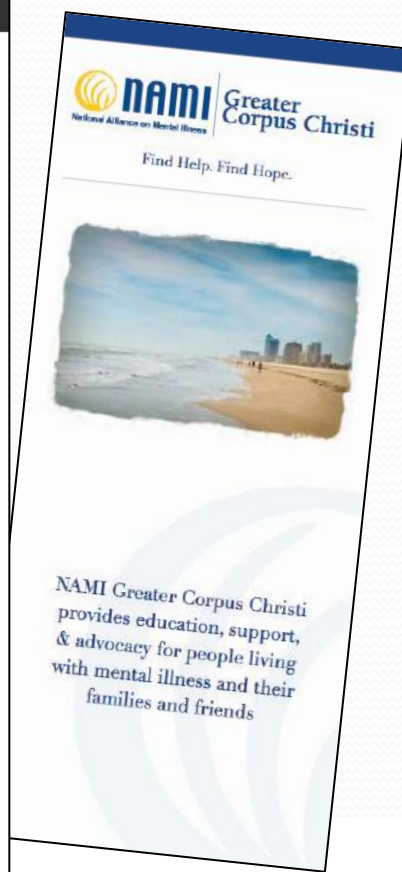

- NAMI Family-to-Family Education Program - a 12-week, 2 1/2-hour free education course for family members, caregivers, friends, and significant others of a loved one with mental illness. Please register for the next course at namigreatercorpuschristi@gmail.com with your name, email, and phone number 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. Currently held in 2 locations:
 - 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
- NAMI Family Support Group - a support group evening for family members of individuals living with mental illness. Free. No registration required. Meetings are held 1st and 3rd 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.

View the Meetings Flyer

General Meetings


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

Upcoming Speaker:



NAMI Greater Corpus Christi
National Alliance on Mental Illness

Find Help. Find Hope.

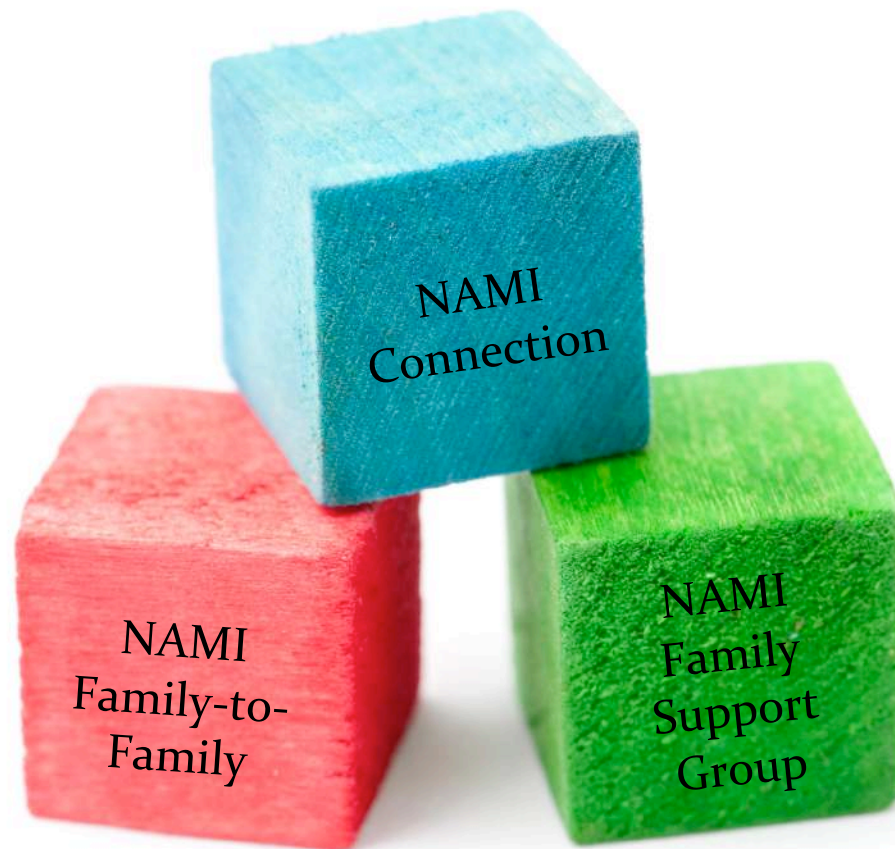


NAMI Greater Corpus Christi provides education, support, & advocacy for people living with mental illness and their families and friends

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.



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/>