Start-Up Packet to Become a NAMI Affiliate

Updated April 2018
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 we can to assist you throughout this process.

There are essentially three major steps involved when forming a new NAMI Affiliate (see the chart below for an overview). These steps gradually increase your NAMI Affiliate’s capacity to support itself, as well as the members of your community who would like to benefit from your services.

Please take some time to read through this packet, familiarize yourself with the steps—in particular Stage 1—and jot down any questions you have. Please also note that there is a statement for you to sign, as well as flyers you can use to advertise your initial meetings, located in the back of this packet. We look forward to supporting your efforts!

**STAGES FOR STARTING A NEW NAMI AFFILIATE**

**STAGE 1: Group Begins Forming - Operating Under NAMI Texas**
During this first phase, the group cannot yet operate under an official NAMI Affiliate name. However, there are a number of formative details that can be established, which will ultimately enable your group to apply for recognition as a NAMI Affiliate.

Application to receive recognition as a NAMI Affiliate

**STAGE 2: NAMI Affiliate Officially Recognized - Operating Under NAMI Texas Model B Affiliate**
Your NAMI Affiliate can now begin offering official NAMI Signature programs. You will also be able to track your own membership, use an official logo, work on additional formative documents, expand your program offerings, and make final preparations to become fully affiliated by NAMI.

Process to be officially affiliated as a Model B NAMI Affiliate

**STAGE 3: NAMI Affiliate Officially Affiliated - Operating as Independent Affiliate Model A Affiliate (optional stage)**
Your affiliate is autonomous at this stage, capable of managing its own finances, insurance, policies & procedures, etc. You have the ability to expand your mental health efforts beyond the NAMI Signature programs, so long as initiatives are in alignment with NAMI’s overall goals.

Process to be officially re-affiliated as a Model A NAMI Affiliate
CHECKLIST FOR STAGE 1: FORMING A NAMI AFFILIATE START-UP GROUP

☐ Sign the statement indicating that your group will abide by NAMI Texas’ policies and procedures while operating in this stage.

The statement is included in this packet. Please print it out, sign, and mail to:
NAMI Texas
P.O. Box 300817
Austin, TX  78703

☐ Advertise the newly forming group in your area and hold meetings to generate interest.

At this time, you can state something to the effect of, “NAMI Texas is supporting the formation of a group in our area”; however, you cannot use any other NAMI name at this point in time. You are welcome to use the sample flyers included in this packet as part of your advertising efforts. Initial meetings can be casual, even held at local restaurants if you so wish. We recommend that you use these meetings to determine interest and need in your community, discuss possible directions for your future NAMI Affiliate, and recruit volunteers help with formative tasks.

☐ Recruit community leaders to serve on your Steering Committee.

At this time, you should have a Steering Committee (as opposed to a Board of Directors). It is recommended that your Steering Committee have between 4-6 members. You should select individuals who are willing to dedicate their time and efforts toward establishing your NAMI Affiliate. It may be helpful to select people who are team players and those who have experience in areas such as leadership, fundraising, communications, education, etc. We also suggest that you try to include individuals who have personal connections to mental illness and/or a familiarity with NAMI. Make sure expectations are clear from the start. Though there are no term limits for Steering Committee members at this time, we suggest you ask for between 1-3 years of commitment from these individuals--enough time for your group to progress through at least two of the stages of organizational development.

☐ Begin taking official meeting minutes at regular Steering Committee meetings.

Establish good procedures for meeting minutes from the start. Once the Steering Committee has been formed, minutes should be taken at every meeting. Meeting minutes should not be a transcript of everything that was said, but instead should outline major decisions or important information that was discussed during the meeting. Each document should also include the date, list of people in attendance, whether or not a quorum was established, and an indication that the meeting minutes have been approved (during the following meeting). Once approved, you cannot go back and change meeting minutes. You also need to hold onto your meeting minutes in an organized manner for future reference. Visit the NAMI Texas website to access a template and sample document called “Board Meeting Minutes.”

☐ Build your membership to at least five (5) members.

During this first stage, keep a written track of all people who are interested in ultimately becoming members of your NAMI Affiliate. Members will be added to a “Virtual Affiliate” in NAMI Texas’ membership system and earmarked for future transition to your NAMI Affiliate’s membership account. Once you are officially recognized as a NAMI Affiliate, these members will be transferred to your NAMI Affiliate’s membership system. In order to apply for official recognition as a NAMI Affiliate, you need to have recruited at least five (5) dues-paying members.
☐ If possible, visit nearby Affiliates offering NAMI Signature Programs.

This is a great time for your group’s leaders to become more familiar with the menu of NAMI Signature Program offerings. NAMI Texas can help you explore whether it is possible to make arrangements for your leaders to sit in on a program being offered at a nearby NAMI Affiliate. You can begin offering NAMI Signature programs once you have been officially recognized as a NAMI Affiliate (Stage 2) and have met the training requirements for those programs. We recommend selecting one of the following programs for your first program offering: NAMI Family-to-Family, NAMI Family Support Group, and/or NAMI Connection (a support group for individuals living with mental illness).

☐ Determine your official NAMI Affiliate Service Area.

Your “NAMI Affiliate Service Area” is defined as the geographical region in which your Affiliate is operating. It should represent the area in which your Affiliate plans to regularly offer NAMI Signature Programs. It is also often somewhat determined by the geography of your area and any natural or regional lines. Most NAMI Affiliate Service Areas encompass an entire county; some, particularly those with major cities on bordering county lines, cover multiple adjacent counties. We encourage you to discuss your Affiliate Service Area options with NAMI Texas staff. Your Affiliate Service Area will need to be officially approved by NAMI Texas.

☐ Determine your official NAMI Affiliate Name.

Your name should appear in the format of “NAMI [Location]” and will need to be approved by NAMI Texas. Most NAMI Affiliates select a major city, county, or small region to reflect their Affiliate service area.

☐ Submit your application for recognition as a NAMI Affiliate.

This application will be provided upon request once your group is ready to move forward.
CHECKLIST FOR STAGE 2: RECOGNITION UNDER NAMI TEXAS (MODEL B)

☐ Transition your Steering Committee to a Leadership Committee
☐ Continue taking minutes at every Leadership Committee meeting
☐ Craft your NAMI Affiliate’s Mission Statement
☐ Draft a 1-year plan for your Affiliate’s next steps
☐ Begin using your new, official NAMI Affiliate logo set in documents and publications
☐ Obtain a post office box
☐ Update your contact information to reflect your new status
   (eg. new mailing address, email that includes NAMI Affiliate name, etc.)
☐ Learn about your role in using NAMI Texas’ financial sub-accounts for your Affiliate-related expenses
☐ Come up with an operating budget and solicit donations for your efforts; donations need to be officially made to “NAMI Texas”, but will be applied to your Affiliate’s sub-account
☐ Create an official membership form for your NAMI Affiliate
☐ Learn how to use your account in the NAMI 360 membership system and begin overseeing membership processes once existing members are transferred to your account
☐ Create a letterhead with your NAMI Affiliate logo and information
☐ Create and begin distributing your NAMI Affiliate’s official brochure
☐ Produce a regular newsletter with at least 2 issues per year (either in print or online)
☐ Create at least a 1-page website presence for your NAMI Affiliate, based on Identity Style guidelines
☐ Determine which NAMI Signature Program(s) your NAMI Affiliate will offer
☐ Arrange for at least two leaders to be trained in one or more NAMI Signature Programs
☐ Begin holding at least one NAMI Signature program in your area
☐ Submit quarterly update reports to NAMI Texas (financials, program offerings, latest progress, etc.)
☐ Learn how to use your NAMI Profile Center account and begin uploading important organization documents to your account
☐ Determine your future organizational structure (remaining a Model B Affiliate or becoming an independent Model A Affiliate)
☐ Complete the Model B Standards of Excellence re-affiliation process (regardless whether you will be remaining a Model B Affiliate or transitioning to a Model A Affiliate)
CHECKLIST FOR STAGE 3: BECOMING AN INDEPENDENT NAMI AFFILIATE (MODEL A)

- Transition your Leadership Committee into an official Board of Directors
- Continue to take meeting minutes at all Board of Directors meetings
- Devise a long-range strategic plan
- Create a Board of Directors contact list
- Establish your Bylaws and have an official legal review (if not using the NAMI Texas template)
- File Articles of Incorporation with the State of Texas (keep a copy of your Certificate of Incorporation)
- Submit your application to become a 501(c)(3) organization
- Create your Board Operating Policies & Procedures, including the seven required policies
- Identify an individual to serve as your main NAMI Affiliate Advocacy Contact
- Open up an official business bank account for your NAMI Affiliate (and close out old sub-account)
- Complete your first annual financial compilation, review, or audit (based on parameters set forth by NAMI)
- Submit your IRS 990 Form annually
- Arrange for insurance coverage (both Directors & Officers and General Liability)
- Upload any other remaining, required Standards of Excellence (SOE) documents onto your Profile Center account

This stage is optional. A NAMI Affiliate may remain a Model B Affiliate indefinitely or make the transition to a Model A Affiliate when they are ready. If you would like to discuss your options with NAMI Texas, please reach out to us. We’re happy to explore your options together and help you determine which Affiliate model is most appropriate for the future direction of your organization.
Agreement to Establish a NAMI Affiliate Start-Up Group

I, __________________________ (name) confirm that I am the founding leader of the new group that is establishing in my region.

As a new group ultimately working toward becoming a NAMI Affiliate, I understand that we will be operating under the auspices of NAMI Texas. As such, we will abide by the provisions set forth by NAMI Texas, accept NAMI Texas’ guidance, and provide information as requested.

Until our group becomes officially recognized by NAMI, I understand that we may not operate under our own NAMI name. We may, however, indicate that NAMI Texas is supporting the establishment of a new group in our area. Our work should always be in alignment with NAMI’s mission.

During this first stage, our group is not considered an independent organization, so we may not manage separate finances, offer NAMI Signature programs, obtain outside insurance, or create separate policies and procedures.

In order to obtain recognition status, there are a series of requirements we must fulfill. Most, if not all, are outlined in this document; however, I understand that since NAMI is in the midst of a transition period, additional items may arise as the process evolves over time. If at any point we have questions about those requirements, we will address these by contacting NAMI Texas.

I understand that our group has one (1) year from the date this agreement is signed to become recognized as a NAMI Affiliate (unless an exception is made by NAMI Texas due to extenuating circumstances outside of our group’s control). If we complete all the initial requirements prior to that date, we will be able to apply for recognition status when ready.

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

Affiliate Start-Up Group Location: __________________________________________

Name: __________________________________________

Signature: _________________________________________ Date: __________
NAMI Texas (National Alliance on Mental Illness - Texas) is establishing an Affiliate in this region. Join us at the upcoming Interest Meeting to share your thoughts and suggestions.
The National Alliance on Mental Illness is an organization dedicated to improving the lives of people affected by mental illness through support, education, and advocacy.

NAMI Texas is interested in establishing a presence in our area. Join us at an upcoming Interest Meeting to share your thoughts and suggestions about this new group.