



nAMIcon

ELEVATING MENTAL HEALTH

**With a Little Help
from our
Friends: How can
NAMI State
Organizations help
Affiliates Maintain
Good Governance?**

Field Governance & Membership Team

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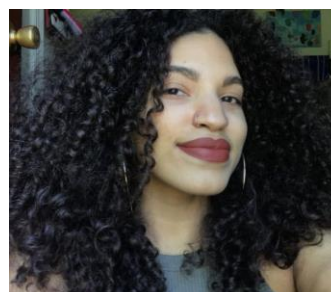
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**By the end
of this
session
attendees
will be able
to...**

- Learn about Roles and Responsibilities and how NAMI State Organizations (NSOs) can work with NAMI Affiliates (NAs) to meet legal and NAMI requirements.
- Identify records/documents that need to be tracked and uploaded into NAMI 360/NAMI 720.
- Be familiar and understand various ways that the NAMI State Organizations and NAMI Affiliates can collaborate to establish best practices including building a much stronger and successful alliance.

NAMI Alliance

It is crucial to our success as a NAMI Alliance, that we are focused on working together and in alignment with NAMI's mission.

The State Organization serves as the central network for activities throughout its state, and it plays a critical role in monitoring and assisting local affiliates as they endeavor to fulfill NAMI's mission.

ROLES AND RESPONSIBILITIES!

Here are some Roles and Responsibilities that could promote good governance between States and Affiliates:

1 Governance

2 Communications & Marketing

3 Programs

4 Diversity, Equity and Inclusion (DEI)

5 Fundraising

6 Policy and Advocacy

Governance

States can work with Affiliates as needed to ensure that filings are submitted timely, and processes are followed accurately.

- **501c (3)**
- **Charitable Registration Filing**
- **Business Incorporation Filing**
- **Annual Report Filing**
- **Bylaws Revision**
 - For revisions to an affiliate's bylaws including any amendments, approval must be obtained from the NSO.
- **Geographical Service Area Expansion and Name Change**
 - Guide, endorse, and decide on geographical area of operation for new groups and geographic expansion for existing Affiliates.



Communications & Marketing

- **State Organizations**

- Regularly communicate with your affiliates – invite to attend meetings such as State conferences, annual NAMI convention and regional meetings.
- Provide training opportunities and manage and operate State HelpLine to connect individuals and families with affiliates.
- Support your affiliate's activities, share in successes, and assist with challenges.

- **Affiliates**

- Communicate needs for training and technical assistance and participate in training opportunities.
- Attend State conferences, annual NAMI convention and regional meetings and actively participate.

Both should provide constructive feedback and evaluations between each other.

Programs

Meeting those in
need where they
are!

State Organizations

- Provide training and certification opportunities for program leaders to match affiliate needs
- Develop and implement programs based on state-specific needs
- Provide technical assistance to affiliates
- Report program data to NAMI

Affiliates

- Report local needs to state organization
- Identify suitable candidates for program leader training
- Provide programs in the local community based on community needs
- Report program data to NAMI and State Organization

Volunteers

State organization and affiliates should coordinate training and recruiting efforts for volunteers

Diversity, Equity, Inclusion (DEI)



Part of the NAMI Culture

State Organization

- Actively recruit geographically and culturally diverse board members representative of your state
- Identify and provide training opportunities for affiliates
- Consider DEI for programs, fundraising, communications when working with affiliates

Affiliates

- Actively recruit a diverse group of board members/committee members
- Communicate DEI needs to state organization
- Engage with your state organization to ensure diverse representation on board/committees

DEI is more than a program or committee, it is a culture!

Fundraising

We all need funds
to operate

State Organizations

- Identify fundraising gaps and opportunities for affiliates
- Collaborate with affiliates in fundraising efforts (i.e. NAMIWalks)
- Build relationships with statewide organizations that might also be willing to work with your affiliates
- Ensure affiliate fundraising efforts are in line with the NAMI mission

Affiliates

- Communicate fundraising needs and challenges
- Follow NAMI guidelines for intellectual property usage
- Engage with the state to identify mutually beneficial fundraising opportunities

Policy & Advocacy

Working in tandem to advocate

State Organization

- Responsible for advocacy at the state level: work with state governments, agencies and representatives
- Seek feedback from affiliates to learn the statewide needs
- Communicate state-wide policies to affiliates as well as communicate and disseminate national policy stances

Affiliates

- Responsible for grassroots efforts at the local level
- Communicate local efforts and needs to the state organizations
- Assist state organization with state-wide policies

Reminder: always ensure that your efforts are in line with NAMI's policy stance!

Documents

It is important that the State and Affiliates maintain a system of recording to track certain documents internally and that these documents are always up-to-date and uploaded into NAMI 360/720.

Evergreen Documents

- State Incorporation
- NSO Charter Agreement
- Incorporated Affiliate Agreements (Model A & C)
- NAMI Addendum to NSO Charter Agreement and Attestation (Model B)
- Bylaws (most current)
- IRS Determination Letter (or proof of 501(c)3 status)
- Policies (Whistleblower, Conflict of Interest, Code of Ethics, Document Retention, Compensation, Inclusivity and Nondiscrimination)

Periodic Documents

- General Liability Insurance - (NAMI National listed as additional insured)
- Director & Officer Insurance
- 990 or 990 postcard
- Proof of submission of Annual Incorporation report with the state
- Charitable Registration / License (or proof of exemption)

Recommended Documents

- Current Board / committee members list
- Current contact information for president and ED
- Current list of Affiliates and their GSA's
- Board policies and procedures
- HR and/or other policies and procedures
- Annual budget
- Annual accounting report
- Board / Committee meeting minutes
- Programming Data

Field Perspective Relationship Building

NAMI Wisconsin 2021 strategic plan and vision we included an emphasis on supporting our affiliates.

- Programming
- Advocacy
- Governance

NAMI Wisconsin Make up is unique:

23 - A affiliates and 1 B affiliate.

Half are all volunteer

Half have at least one paid staff member

In last three years 5 affiliates have hired first Employees and we are growing!



Field Perspective Relationship Building

Relationship building is the foundation.

1. Monthly affiliate zoom meetings.
2. Invite them to be part of the process – DEI committees, PPA committees, Affiliate Membership and Program Committee, part of the conference planning committee.
3. Quarterly ED meetings for professional development, collaborating sessions, ideas and sharing session.
4. Program development. Program team developed roadmap we take to the affiliate to help them understand their needs and focus on trainings they need.
5. Quarterly program coordinator meetings with program team, quarterly data with fun data collection opportunities. We draw names from hat of affiliates that submitted data that quarter. We try to make it fun and rewarding to send us data!
6. Leadership Landing Page - Emphasis on templates, information, toolkits, guides, program information and access to all governance, programming and media suggestions affiliates can use and keep on our website and update frequently.

This requires the program team, development team and the communication and events director to always think about the affiliates. Our Mental Health Awareness Month is about how can we support and provide items for them to use in the community.

Field Perspective Relationship Building

Relationship building is the foundation:

1. Affiliate Leadership Summit. This provides affiliate and professional development opportunities.
2. Connect new ED's with mentors to help them learn the ropes. Try to connect them with ED with similar size or similar community needs.
3. NSO provides support for onboarding of new staff, new board members.
4. Attend affiliate board meetings on request to explain what we do, and how we can support the affiliates. Attend NSA events to show support and learn needs.
5. Send cards of support when personal events occur, recognize outgoing leaders with an Iris Pin and card, spotlight affiliates as we can.
6. Travel to the affiliates to meet, learn, listen to them and their needs.
7. Fun opportunities for Networking. Our conference we host an affiliate networking session that includes drinks and social games.
8. Monthly E-news that informs the affiliates of all events, program opportunities, advocacy opportunities, affiliate learning and networking opportunities.

This is all done with the amazing support of our Associate Director who is the affiliate contact person for all things governance, affiliate staff connections, event planning for all the affiliate events we host and communication. Communication. And once again Communication.

NSO ask for Documents

In the fall of each year our Associate Director and Office Manager send out a request for documents. They hand hold the affiliate's volunteers or staff who need support through the process.

We also collect quarterly data. This data includes programs, fundraising, outreach events, and support call/emails. We use Qualtrics (used to use survey monkey) to collect data. Several of the affiliates find this data collection now find helpful to apply for local grants. At first it was not a happy process, but we did goofy mini grant drawings to encourage participation.

- [Annual affiliation and documentation process](#)

- This covers NAMI National requirements, NAMI WI requirements and WI state nonprofit laws

- [Affiliate Benchmarks](#)

NSO and NSA

On the same team

While it is odd that the contract signed is NSA with NAMI and not the state, NSO are asked by national to provide support and training to the affiliates. While the structure now is messy, it all starts with vision, mission and relationships.

1. It should be a mission of the state office to support the affiliates and build those relationships.
2. It should be a mission of NAMI to mentor the relationship between the affiliates and the state office.
3. NSO should find ways small and large that you can support building relationships with the affiliates. Templates, communications, trainings, MHAW, MHAM, how can you engage and support.
4. For states that have the funding, a designated person to support the affiliates goes a long way.
5. Affiliates recognize and celebrate the work the states do for the affiliates. We had many affiliates support our building renovation campaign, understanding we need funds to support what we do.
6. Affiliates be willing to mentor new and other affiliates.
7. We all have the same goal and vision. Support, educate and advocate for those living with mental illness.

Resources

Roles and Responsibilities Document

https://www.nami.org/NAMI/media/NAMInet/Ops-Gov/Roles-and-Responsibilities-in-the-NAMI-Alliance-Final_6-20-2017.pdf

NAMI National Bylaws

<https://www.nami.org/NAMI/media/NAMInet/BOD/NAMINationalBylawsCURRENT.pdf>

NAMI 360 FAQs

<https://help.nami.org/collection/128-nami-360>

NAMI 720 FAQs

<https://help.nami.org/collection/258-nami-720>

Questions





Thanks for Joining

For questions, please contact:
standards@nami.org

