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Affiliate TOOL KIT

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Contact the state office to request Tool Kit supplements

Thank you for offering your time and energy to your affiliate of NAMI North Carolina. Because of your commitment to our cause and your willingness to serve, we can—and do—have a lasting positive impact on the lives of families and mental health care consumers coping with mental illness throughout North Carolina.

If you're a first-time officer, director or committee head of your affiliate, you may feel overwhelmed with your new responsibilities. If you're a seasoned veteran, you may be looking for fresh ideas to revitalize your affiliate. In either case, we created the Affiliate Tool Kit for you.

Use the Tool Kit to—

- Educate and orient new affiliate leaders.
- Build understanding and consensus about our organization's mission and goals among your members.
- Provide officers and committee heads the information and perspectives they need to do their jobs more efficiently and effectively.
- Adapt ideas and strategies that have worked for other affiliates to yours.
- Help organize your affiliate and its activities so your members can spend less time on preparation and planning and more time on getting the job done.

Thank You



We've chosen a loose-leaf binder format because we consider The Affiliate Tool Kit to be an ongoing project. We plan to add new ideas, program descriptions and other materials as we develop them, and we hope you will supplement the various sections of your Tool Kit with information specific to your affiliate. You may also create new sections in which to store meeting minutes, copies of newsletters and other reference materials.

Besides being a useful reference as you operate your affiliate, your Tool Kit will help ease the transition for new officers.

Call Us. We Can Help.

Please keep in mind—we created The Affiliate Tool Kit to supplement—not substitute for—the support services our state office staff provides each affiliate. Besides using the Tool Kit for ideas, training and reference, we urge you to work directly with our staff to receive support

and guidance tailored to your affiliate's individual situation, resources and needs.

Please let us know if you have suggestions for improving The Affiliate Tool Kit and be sure to share your best ideas with us for possible use in an upcoming Tool Kit revision or addition.

Thanks again for your service to your affiliate.

As the blades of grass in our logo symbolize, NAMI is a grassroots organization providing support, education and advocacy for the families and friends of people with serious mental illness and for persons with serious mental illness.

As part of the National Alliance for the Mentally Ill, NAMI North Carolina focuses on serious mental illnesses caused by brain disorders that can affect the ability to think, feel and relate to other people and the environment.

For adults, serious mental illnesses include schizophrenia, major depression, bipolar disorder (manic depression), obsessive compulsive disorder, panic disorder and other brain disorders.

For children and adolescents, serious mental illnesses include those experienced by adults as well as attention deficit disorder, autism, pervasive developmental disorder and Tourette's syndrome.

Membership consists primarily of family members and friends of people who have mental illness, mental health care consumers, friends and mental health care professionals. Our support comes from member donations, corporate and other philanthropic grants and state grants.

With an estimated 20 percent of families affected by mental illness, our organization's membership

represents only a small fraction of those who could benefit from our services and add their voices to ours. As a leader of your affiliate, you can nourish our grassroots by extending our support, education and advocacy to more of these families in your community.

A Brief History of Our Organization

In April 1979, six independent support groups for parents of adults with severe and persistent mental illnesses from around the country joined forces in Madison, Wisconsin, to hold the first conference of the National Alliance for the Mentally Ill. Attendance for this historic meeting was 284.

As NAMI has evolved, interest and membership has extended beyond parents to include spouses, siblings, children and friends of people with mental illness as well as a number of mental health care professionals. Most recently, a growing number of mental health care consumers have become active members of NAMI. NAMI currently has approximately 203,000 members in 1,200 affiliates across the country.

Support, Education & Advocacy



Like our national counterpart, NAMI North Carolina began when several independent support groups from around the state united to form a larger organization. In March 1984, our organization—founded as the North Carolina Alliance for the Mentally Ill—held its first statewide conference in Greensboro for more than 100 attendees.

In 1986, we hired our first executive director, John Baggett. Beth Melcher has been our executive director since 1994.

NAMI North Carolina now has approximately 1,400 members, most of whom are involved in one of 30 local affiliates serving 35 North Carolina counties. We recently purchased new office space in Raleigh for our staff of nine full- and part-time employees.

What We Do

From the time the first symptoms of severe and persistent mental illness appear, through diagnosis, treatment and daily coping, families need a great deal of help and support.

They need to realize they are not alone—that there are families in their own communities who understand and want to help them meet the challenges they face.

They need to learn about the disease affecting their family member and about the resources available for treatment, housing and financial aid.

As they experience firsthand the prejudices and unfair discrimination against people with brain disorders, they need opportunities to advocate for change.

According to its mission statement, our national organization “is dedicated to the eradication of mental illness and to the improvement of the quality of life of those whose lives are affected by these diseases.”

To accomplish these goals at both the state and local levels, NAMI North Carolina and its affiliates support, educate and advocate for North Carolinians coping with severe and persistent mental illness.

From Article I, NAMI North Carolina bylaws. A complete copy of our bylaws is available on request as a supplement to your tool kit.

NAMI North Carolina—Why We're Here

- To promote the quality of care, rights and interests of mentally ill citizens, particularly of those who cannot speak for themselves, and to advocate such policies at the local, state and national levels to ensure accomplishment of these objectives.
- The active promotion of a high quality no-eject continuum of care from state hospitals through various community facilities and support programs for persons who have prolonged mental illness.
- The active promotion of housing with varying degrees of supervision for individuals suffering from mental illness.
- The promotion of job training and low stress employment—voluntary or paid—to help the mentally disabled person become as self-sufficient as possible and to promote his or her self esteem.
- To support and advocate for research into the causes, alleviation, and eradication of mental illness.
- To develop an enlightened and more sympathetic public understanding of the problems of those afflicted with mental illness and increase awareness of the public responsibilities in dealing with these problems.
- To monitor existing health care facilities, staff, and programming for adequacy and accountability, and to influence the professional and the continuing education of mental health service providers.
- To improve communication and cooperation between mental health agencies and the families of mentally ill citizens.
- To encourage and aid in the formation of affiliate groups and growth of membership throughout the State of North Carolina.
- To facilitate support and sharing activities for affiliates and their members.
- To inform affiliates and their members of relevant information on research findings.
- To serve as an information, collection, and dissemination center for affiliated organizations within the State of North Carolina.
- To solicit, receive, and contribute funds for the above-stated objectives.

Your Affiliate's Role— An Overview



As grassroots organizations, NAMI and NAMI North Carolina derive their strength and deliver most of their services through local and area affiliates like yours.

You and your fellow affiliate members truly are on the front lines in our battle to improve the quality of life for people and families coping with mental illness and to eliminate prejudice and unfair discrimination against them.

NAMI North Carolina affiliates range in size from the five-member minimum to groups of more than 100 members. Some affiliate groups are older than NAMI North Carolina itself, while others are just getting started. As a NAMI North Carolina affiliate, you focus your resources on programs and projects to support one or more of these general affiliate functions—

- Support
- Education
- Advocacy
- Development
- Member Services
- Community Relations

Support, Education & Advocacy

The support you provide callers and newcomers to your support group meetings makes them realize they are not alone and helps them get their problems under better control.

After participating in NAMI North Carolina's training

programs, established affiliate members teach newer members about the nature and treatment of mental illnesses affecting their families.

Your affiliate also identifies and educates individuals and organizations in your community who come in frequent contact with people suffering from mental illnesses, such as mental health care providers, employers, educators and law enforcement officers.

Finally, your affiliate helps teach the general public about severe and persistent brain disorders to help reduce the stigma associated with mental illness and to build understanding and support for key issues.

Ultimately, once they understand the illnesses and have secured the help they need to handle their personal situation, your affiliate's more seasoned members begin learning about important political and social issues. They then start working to address these issues through advocacy.

As advocacy organizations, NAMI, NAMI North Carolina and your affiliate track and keep your members informed about

important political and social issues affecting people with mental illnesses and their families.

Ideally, affiliates closely coordinate and align their advocacy efforts with those of NAMI North Carolina. Individual affiliates or members of an affiliate should not begin advocating for a particular cause or position without first coordinating their plans with the state office.

Individual members advocating for their own causes should not mention or imply they represent your affiliate or the state organization.

Memberships & Dues

NAMI and NAMI North Carolina encourage all affiliates to offer two levels of membership—

- Standard (or Individual/Family) Memberships for individuals or a family unit and mental health care professionals.
- Open Door Memberships for mental health care consumers and individuals and families with limited incomes.

If you wish, you may create a separate membership category for mental health care professionals and reserve the standard membership for family members and friends of people with mental illness.

Joining NAMI at any level—local, state or national—automatically enrolls the new member in all three levels of the organization.

Donating money to an affiliate or to the state or national organization does not result in membership. If the donor wants to join NAMI at any level, he or she must fill out the membership form and pay dues.

Setting Dues Amounts

In the past, dues amounts varied considerably from affiliate to affiliate. As part of NAMI's effort to standardize its programs and services nationwide, both the state and the national organizations strongly encourage all affiliates to standardize dues amounts as well.

Set annual dues for standard and professional memberships at \$25, including \$13 for your affiliate, \$7 for NAMI and \$5 for NAMI North Carolina.

NAMI classifies any annual dues amount less than \$25 as an Open Door Membership. Set your affiliate's annual Open Door dues at \$3, including one dollar each for your affiliate and the state and national organizations.

With a standardized dues structure throughout our

organization, we can simplify bookkeeping and minimize confusion for members moving from one part of the state or country to another.

If your dues are not currently \$25 and \$3, you may need to revise brochures and other materials you use to recruit new

members. Contact the state office for free graphic design services and help with printing costs.

If your board feels the benefits of membership are not worth \$25 a year, contact the state office for help in improving your affiliate's programs and services.

Member to Member Why Our Community Needs NAMI Wilson County



by Jerney Minshew, President
NAMI Wilson County

I'm proud of how our affiliate—NAMI Wilson County—meets so many important needs in our part of North Carolina. Our support system is well established, with veteran members offering their knowledge and experience to help our steady stream of newcomers. We have some real old-timers here who are knowledgeable enough to be psychiatrists' psychologists.

Traditionally, we have collaborated—rather than competed—with other community organizations whose missions are compatible with ours. Besides serving our community, we strongly believe such collaboration results in more effective advocacy.

Several of our members serve as directors of these organizations, bringing our concerns and perspectives to bear on their decision-making. Two of us serve on the local Mental Health Association Board, and I'm on the Human Rights Committee as well as the Area Mental Health Authority Board.

We've worked with our local Mental Health Association on housing and Operation Santa Claus and with Food Lion on a fund raising event. We also raise money by selling greeting cards from The National Alliance for Research on Schizophrenia and Depression.

For more information, contact Jerney Minshew at 252 243-4699.

Dues Sharing

For every \$25 direct membership received at the NAMI national office each quarter, NAMI rebates \$18 to the appropriate state organization. The state office then forwards \$8 of the rebate to your affiliate for every new member who lives within your affiliate's service area.

For new members who join NAMI under the \$3 Open Door rate, NAMI rebates \$2 to the state organization. The state office sends the entire \$2 rebate to your affiliate for every new Open Door member living in your service area.

After a new member's initial membership expires, your affiliate is responsible for sending dues notices and collecting renewal dues, just as you do for affiliate members who joined NAMI at the affiliate level.

NAMI Building Blocks

In return for dues sharing, NAMI expects each of its affiliates to meet basic minimum service standards.

With the publication of *NAMI Building Blocks: Growth and Development of Local Affiliates and State Organizations*, NAMI has given us the tools our state organizations and their affiliates need for effective self-evaluation and improvement.

Member to Member How We Jump-Started Our Affiliate



by Elaine Purpel
NAMI Guilford County

Four years ago, NAMI Guilford County appeared to be dying. Membership had dwindled to fewer than half the previous members. Very few attended education and support meetings, and no one could be found to serve as president. After seriously considering disbanding the affiliate, the board decided to hang on one more year without a president and divide the work equally among board members. Not only did NAMI Guilford County survive, it has thrived. Today, membership is at an all time high, attendance at education meetings is very respectable, and the treasury has never looked so good.

To learn more details, contact Elaine Purpel at 336 275-7127.

NAMI asks each state organization to distribute questionnaires to each of its affiliates annually. Through the evaluation process, your affiliate can define its strengths and identify opportunities for growth and improvement.

NAMI North Carolina will use affiliates' self-evaluations to determine what services are available throughout the state and what types of technical support each affiliate needs to meet quality and service standards.

NAMI North Carolina must report the results of the annual Building Block evaluations to NAMI, along with submitting its own self-evaluation form for review by the NAMI staff.

The Building Blocks program presents clear guidelines for expanding and upgrading your affiliate's service to your community. With the training and program support available through NAMI North Carolina, your affiliate can access the resources you need to improve the quality and variety of services you offer.

Once the Building Blocks program is established, only those affiliates filing annual evaluations with the state office will be eligible to receive dues rebates from NAMI.

Wonder where you stand right now? Use the checklist, based on the evaluation questionnaire, for a preview of your affiliate's status.

Please contact Beth Greb at the state office if you have any questions about either the dues sharing process or the NAMI Building Blocks program.

Member Services

People join your affiliate for the services and opportunities you provide—

- One-on-one support from fellow members and/or your local telephone contact
- Family-to-Family Support groups
- Educational programs featuring expert guest speakers
- Local, state and national newsletters providing news and useful information from community, state and national perspectives.
- Guidance and support from Young Families mentors
- Chances for meaningful involvement in programs and projects to reduce the stigma of mental illness and improve services and care
- Access to free training by the NAMI North Carolina staff for members who want to facilitate a support group, teach a course, advocate more effectively or present educational programs to church and civic groups

Your affiliate also serves members by keeping them informed about affiliate activities, encouraging them to keep their membership current, finding a place to meet, supplying refreshments at meetings and making sure visitors and newcomers feel welcome.

Affiliates' Checklist

- Board of directors and some working committees
- Articles of incorporation & bylaws
- Non-profit 501(c)(3) status
- A regular newsletter and/or meeting notices
- Monthly educational meetings
- Regular monthly or quarterly business meetings
- Public presentations
- Educational programs and forums
- Outreach to diverse groups (consumers, families of children and adolescents, siblings, multicultural groups)
- Information and referral services (or connection with a central referral service through the state organization)
- The NAMI Family-to-Family Education Program
- Facilitating one or more support groups
- Advocacy in the community and state level
- Ability to take advantage of technology (e.g., answering machine, fax, e-mail)
- Mental Illness Awareness Week activities
- Engage in fund raising efforts
- Work with the media
- Active membership growth
- Two-way communication and information sharing with the state organization
- A designated representative to the state consumer council who will assist in coordinating consumer affiliate activities and outreach
- Provide formal, centralized information and referral services, hot lines, 800 number
- Involve other community groups in the NAMI brain disorder (mental illness) agenda
- Engage in grassroots advocacy on local, state, and federal issues
- Secure local media publicity and community relations
- Conduit for information to and from the state organization and NAMI regarding new issues and initiatives

Community Relations

As a community service and advocacy organization, your affiliate must reach out to other organizations and individuals. The community relations function involves developing mutually beneficial relationships with specific groups within the greater community you share.

Some community relations targets might include—

- Prospective members
- A specific cultural, ethnic or socioeconomic group
- The state psychiatric hospital serving your county
- The Area Mental Health Authority
- Mental health care providers
- Government officials
- Editors and reporters
- Other local and regional advocacy groups
- Hospitals and primary care physicians
- Churches
- Colleges and universities
- Businesses and civic groups

NAMI North Carolina encourages affiliates to cultivate meaningful working relationships with a variety of people and groups. Over time, your goal is to create a strong network of contacts who know you, respond to your questions and requests and refer prospective members to you for service.

Funding Your Affiliate

Member dues generate income to cover the basics for your

affiliate, such as office supplies, photocopying, post office box rental and postage. Your affiliate will need additional funding for the services you provide.

Many affiliates raise money through special events or by having members sell merchandise. The events may be strictly to raise money, such as a yard sale or bake sale, or they may be designed to meet educational and community relations goals, too.

For example, if you set up an educational display, distribute brochures, sell merchandise and accept donations at a hospital health fair booth, you will simultaneously educate the public, raise your affiliate's visibility and solidify your relationship with the hospital as well as raise money. The NAMI North Carolina staff is happy to support you in planning and staging special events to raise money for your affiliate.

The best way to fund your affiliate programs is through community and foundation grants. NAMI North Carolina strongly encourages its affiliates to seek donations and grants from businesses, civic groups and community foundations. Some affiliates have applied for and received foundation grants for housing and clubhouses, or they have helped their area programs do so. Others have funded their affiliate's presentation of the play, "Balancing Act," in their communities. Grant-seeking involves—

- Carefully planning programs and projects to be supported
- Finding the right organizations to approach
- Writing grant proposals
- Submitting the proposals to the organizations

If you're new to grant-seeking, you can learn about the grant application process and polish your proposal writing skills through NAMI North Carolina's Affiliate Grant Program. The program offers grants to help affiliates improve their capacity to serve their members and their communities and to support special affiliate events and projects. Contact Membership Development Coordinator Beth Greb for information about the Affiliate Grant Program.

Remember, before you launch any fund raising efforts involving community foundations, you must have incorporated your affiliate and applied for official 501 (c) (3) status. Consult with the NAMI North Carolina development director, Zanna Cipriani, for help with identifying appropriate organizations to approach and advice on preparing grant proposals.

Funding NAMI North Carolina

NAMI North Carolina funds its operations primarily through dues, grants and charitable contributions. Affiliates support the state office by making donations regularly from the affiliate treasury.

From Support to Education to Advocacy



NAMI's growth and vitality depend primarily on each affiliate's ability to attract and keep members. As an affiliate leader, you are responsible for—

- Understanding how individuals' needs for support and education and their interest in advocacy develop over time
- Making sure your affiliate addresses those changing needs and interests at every stage of development

Those whose primary need is for information often have their first contact with your affiliate through the Family-to-Family Education course.

Others find us when they need support. Often, their call to your contact number comes after months—even years—of trying to cope with a family member's mental illness on their own. Some callers are in crisis and need your help immediately.

As a general rule, an affiliate member's interest in advocacy develops only after the more pressing needs for support and education have been filled. You can encourage newcomers to advocacy to become involved by planning ongoing advocacy projects involving issues of direct, personal interest to newer members.

As their interest and confidence grow, recommend the Leadership Academy as an opportunity to improve advocacy skills.

This evolution from support to education to advocacy can take a few months or a few years, depending on the member and the circumstances. The healthiest affiliates have members at all three stages at all times.

Key Affiliate Programs

Because of the critical role support and education services play in our organization's health and wellbeing, NAMI North Carolina expects each of its affiliates to offer both Family-to-Family Support groups and Family-to-Family Education courses.

With well developed Family-to-Family Support and Education programs in place, your affiliate can offer the best possible service to your community.

Since new members are vital to your affiliate, you will benefit from the steady stream of prospective members the Family-to-Family programs provide.

As new members of your affiliate, Family to Family Education course graduates are well prepared to assume leadership roles

Contact Family-to-Family Coordinator Matisha Brown for information on NAMI North Carolina's training program for support group facilitators and course instructors.

Strategies for Getting & Keeping Members

Although the 12-part Family-to-Family Education course is fairly comprehensive, most recent Family-to-Family graduates want to learn even more about such issues as housing, available services and benefits and current drugs and treatments. With their interest and motivation at its peak, course graduates represent your affiliate's best new member prospects.

Visitors to Family-to-Family Support group meetings represent a second important source of new members.

Your affiliate's ability to manage relationships with Family-to-Family Education course graduates and Family-to-Family Support group visitors determines your affiliate's quality and growth potential.

To interest prospective members in joining and remaining active in your affiliate—

- Make sure all your members are aware of the critical importance of new member recruiting to your affiliate, NAMI North Carolina and NAMI. Help them understand the potential of the Family-to-Family programs to membership growth.
- Encourage affiliate members to attend the final session party of the Family-to-Family Education course.
- Have membership forms available at all meetings.
- Plan an educational meeting related to course content soon after a course ends and invite all graduates to attend.
- Invite all course graduates to join your affiliate's Family-to-Family Support group.
- Invite all support group visitors to enroll in upcoming Family-to-Family Education courses.
- Plan social events such as pot luck dinners, picnics, luncheons and awards dinners throughout the year and invite prospective members to attend.
- Add visitors' and course graduates' names to the newsletter mailing list.
- Follow up invitations with telephone calls to remind the prospective member of the event.
- Arrange for designated affiliate members to greet visitors and make sure they feel welcome.
- Pair established members as partners with new members to be sure they get the most benefit from their involvement

Member-to-Member Small is Beautiful

by Charles Owens, President
Person County AMI



Operating as we do within the culture of a small rural county, we have only a handful of members. Though small in number, Person County AMI is big in heart and service.

We meet monthly from September through May for education and support, with about 10 members attending regularly. Meetings featuring local speakers or educational videos are the most popular.

Two of our members serve on the Area Mental Health Authority Board, and I am trained as a Family-to-Family teacher.

With several ministers among our members—including me—our affiliate has naturally reached out to local churches, supplying speakers and a bulletin insert during Mental Illness Awareness Week. In the future, we'd like to sponsor a workshop for clergy. Next spring, I plan to work with a partner to teach a Family-to-Family course.

For more information, contact Charles Owens at 336 597-3916

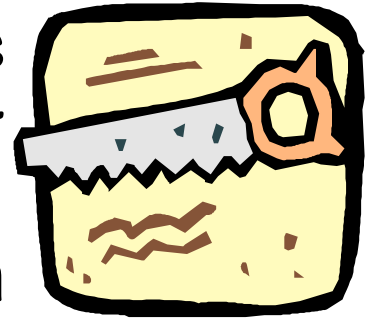
in your affiliate and your affiliate gets the most benefit from their interests and skills.

- Involve new members early by personally asking them to complete a specific task.
- Continue to provide meaningful opportunities for participation and involvement for members at all levels.
- Avoid making general calls for project and program volunteers. Instead, get to know your members and ask one-on-one for their help with specific tasks suited to their interests and skills.

- Survey all affiliate members annually about their needs and interests and set priorities accordingly.

Member recruiting and retention require a concerted effort by all members of your affiliate. In particular, board members, support group facilitators and course instructors need to work cooperatively to create and maintain an ongoing recruiting and retention program for your affiliate.

Who Does What at NAMI North Carolina



Your state office staff is here to help you strengthen your NAMI North Carolina affiliate. Here are staff members who can help you operate your affiliate more efficiently and provide more and better services—

Membership Development Coordinator Beth Greb

is your affiliate's primary contact with NAMI North Carolina. Beth can help you organize and manage your affiliate, conduct more effective meetings, plan programs and activities, publish a newsletter, recruit new members, solve problems...the list seems endless. She'll also consult with you on preparing your application to the Affiliate Grant Program for a capacity-building grant to strengthen your affiliate or a community outreach grant to enable your affiliate to sponsor bigger and better programs and projects. Whatever the question, problem or proposed project, chances are Beth has the experience and access to the resources your affiliate needs. She is available for telephone consultation and to conduct workshops and retreats in your community.

Executive Director Beth Melcher, Ph.D., is NAMI North Carolina's legislative liaison and can help your affiliate respond effectively to government and legal issues. Beth represents our organization as a media spokesperson and member of a number of state committees and boards. She is also your affiliate's contact for NAMI's Campaign to End Discrimination.

Young Families Program Coordinator Linda Swann is our resident expert on issues affecting families of children or adolescents with serious emotional disorders or mental illnesses. Contact Linda for help with serving young families through your affiliate or offering teacher training programs.

Family-to-Family Coordinator Matisha Brown

can provide your affiliate with the training and support you need to offer the Family-to-Family Education course and/or support groups.

Helpline Coordinator Gloria Harrison

is our statewide contact for family members, consumers and professionals who call the Helpline for information, referrals and support. When she receives calls from the area your affiliate serves, Gloria often provides the name and telephone number for your affiliate's contact so the caller can seek help locally. Gloria can answer your questions about services and resources available throughout the state, and she maintains a long list of sources who can provide additional details.

Director of Development Zanna Cipriani

is here to advise you and answer your questions about raising money through community and foundation grants, special events and individual contributions. She also coordinates fundraising activities for NAMI North Carolina and is staff liaison for the Board of Advisors.

Administrative Manager Norma Whitfield

manages operations and finances for the state office and handles ongoing communication with the national organization. Norma also organizes NAMI North Carolina's Spring Conference and Fall Institute and works on NAMI's Campaign to End Discrimination.

Development and Information Secretary Linda Buzard

handles donations, acknowledges gifts to NAMI North Carolina and edits "Clippings."

Membership Secretary Martha Brock

handles dues, keeps track of mailing addresses, affiliates' membership lists and is the person to contact when your affiliate elects new officers or makes other personnel changes.

What's What

As a service organization, your affiliate's primary purpose is to bring support, education and advocacy into your community. NAMI and NAMI North Carolina already have in place a number of programs and services for your affiliate, including—

The Affiliate Grant

Program—A potential funding source to help your affiliate strengthen and build capacity or sponsor more ambitious community outreach programs and projects while introducing you to the grant-seeking process and sharpening your proposal-writing skills.



Helpline—A toll-free telephone information and referral service, staffed during business hours by NAMI North Carolina. The Helpline staff provides information to callers including mental health care consumers and their families and friends, to families of children with emotional disorders and to professionals. When someone who lives in your area calls the Helpline, we refer them to your affiliate as a local contact.

Family-to-Family

Education—A 12-week course for families of people with severe and persistent mental illness. The course helps participants learn more about the nature and treatment of mental illness, develop coping skills and access services and other resources available to their families. NAMI North Carolina offers free training for volunteer instructors from affiliates throughout the state and provides ongoing funding and support.



Family-to-Family Support

NAMI North Carolina provides a free training program for volunteers who want to lead support groups sponsored by their affiliate. The state office also provides ongoing funding, support and maintenance services for Family-to-Family support groups.

Young Families Network

A referral program to put parents of children with a serious emotional disorder, behavior problem or brain disorder in contact with other parents



who are coping successfully with similar problems. NAMI North Carolina is developing a Young Families Network manual

offering guidelines and sample materials available for network volunteers.

Young Families Training for Educators

—A program to help teachers, guidance counselors, school nurses and school psychologists better understand the nature and treatment of serious emotional disorders and mental illnesses experienced by their students. NAMI North Carolina offers free training to affiliate members who volunteer to participate in this program.

Young Families Mentoring

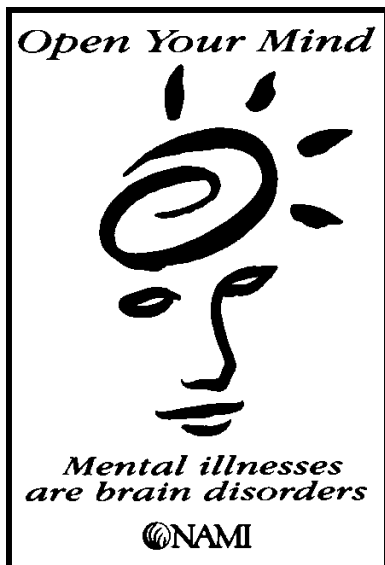
—A program to train and refer parents experienced in coping with a child's serious emotional disorders or mental illness to serve as mentors to young families whose children have similar problems.

Leadership Academy

—A training program offered by NAMI North Carolina to teach interested affiliate members how to be more effective advocates.

The Science & Treatment Program

—A program supported by the NAMI Campaign to End Discrimination to train volunteers to present informational programs about the nature and treatment of mental illnesses to business and civic groups.



Campaign to End Discrimination—A nationwide campaign by NAMI to educate people about the neurobiological origins of mental illness. NAMI North Carolina provides support materials to present programs and conduct awareness campaigns in your community.

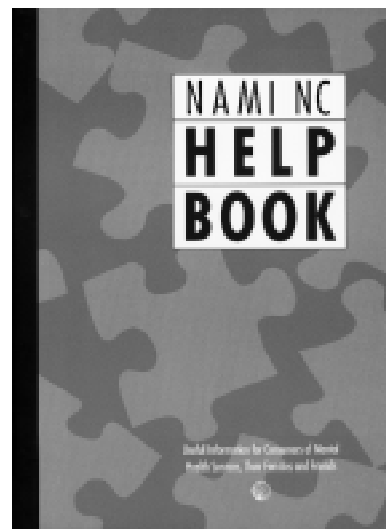
Spring Conference—A two-day event held annually by NAMI North Carolina, featuring guest speakers, seminars and workshops of interest to members, professionals and the public.

Fall Institute—A one-day educational meeting held annually by NAMI North Carolina focusing on a single topic of interest.

Alerts—NAMI North Carolina's system of notifying your affiliate about pending legislation that can benefit from your members' influence and support. The most urgent alerts may be disseminated by email and/or telephone to your affiliate's designated member who, in turn notifies your members through your affiliate's telephone tree. When time permits, you may receive alerts by mail. Pending legislation is also featured regularly in NAMI North Carolina's newsletter.

Newsletters—All members of a NAMI affiliate receive the NAMI newsletter, "Advocate," and the NAMI North Carolina newsletter, "Clippings." Many affiliates also publish a newsletter for their members.

Creating a Circle of Caring—The Church and the Mentally Ill—A book by NAMI North Carolina past president Shirley Strobel to help churches minister more effectively to people with mental illnesses.



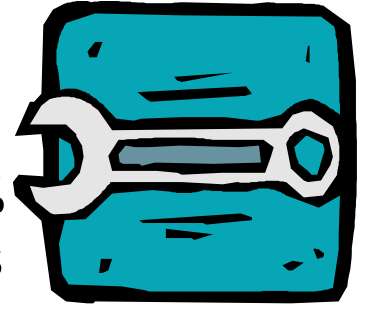
The NAMI North Carolina Help Book—A comprehensive guide to resources available in our state. The Help Book includes information about various mental illnesses and their treatment, along with guidelines for accessing support services.

Other Resources—Many other educational brochures, booklets, books and tapes are available from NAMI.

Call On Us

The NAMI North Carolina staff is here to serve you and help you strengthen your affiliate. Please contact us for help with all your affiliate operations, programs, activities and concerns.

Organizing for Success



Clearly, the best-run affiliates are almost always the ones that are the best organized. They have formulated bylaws, filed articles of incorporation and secured non-profit tax status. They have elected officers and appointed committees. They have developed policies and procedures and have plenty of volunteers in place to handle key affiliate functions, such as answering calls, holding meetings and collecting dues.

Bylaws

If your affiliate has not already done so, we encourage you to develop and adopt bylaws immediately.

NAMI North Carolina bylaws and sample affiliate bylaws are available from Beth Greb in the state office. We recommend using the sample as a framework for developing your own affiliate bylaws.

Incorporating Your Affiliate

NAMI North Carolina encourages all its affiliates to organize as a corporation.

By creating a separate legal entity for your affiliate, you lend legitimacy to your organization and make it eligible for non-profit tax status. Most charitable foundations require you to submit your articles of incorporation before considering your proposal for a grant.

Incorporating your affiliate also shifts certain legal liabilities from individuals to the organization itself.

Incorporation is a simple process requiring you to complete and file an “Articles of Incorporation—Nonprofit Corporation” form with the North Carolina Secretary of State’s office. The filing fee is \$60, and help is available from NAMI North Carolina for affiliates unable to afford the filing fee. Normally, it takes a week to ten days for your form to be processed.

If your affiliate is already incorporated, you need to notify the State Attorney General’s office and the NAMI North Carolina office any time you amend your articles of incorporation, change your principal office address or rename your affiliate.

Sample forms and help with completing them are available from Beth Greb in the NAMI North Carolina office. To request forms, call the Secretary of State’s office at 919 733-4201 or download them from the Secretary of State’s World Wide Web site at <http://www.state.nc.us/secstate/>.

Non-Profit Tax Status

Nonprofit corporations with charitable, educational, scientific, religious or cultural purposes have tax exempt status under section 501 (c) (3) of the Internal Revenue Code.

If your affiliate’s receipts are no more than \$5,000 per year, donations you receive may be tax-exempt for the donor even without securing official tax-exempt status. However, many individual donors and nearly all grant-making foundations contribute only to organizations that have formally applied for and received tax exempt status. Non-profit mailing rates and some state and federal tax exemptions are available only to organizations with official tax exempt status.

Because of these many important advantages, NAMI North Carolina urges you to seek tax exempt status—also known as 501 (c) (3) status—as soon as your affiliate is incorporated. Don’t wait for a donor to come along with a check before you file for 501 (c) (3). By then it will be too

late to give your sponsor a tax break.

As a tax-exempt corporation, your affiliate may not endorse or oppose any political candidate. Your members may lobby legislators, but you may not spend more than 20 percent of affiliate income doing so. Since affiliates do not typically hire professional lobbyists, your lobbying costs should be well below the maximum.

There are other important restrictions on what 501 (c) (3) can and cannot do. To avoid legal problems, be sure to contact our director of development, Zanna Cipriani, before you begin any fund raising activities.

Call Membership Development Coordinator Beth Greb in the NAMI North Carolina office, and she'll send you whatever additional resources you need, including—

- Sample affiliate bylaws
- Detailed instructions for incorporating your affiliate
- A complete package of the forms you'll need to apply for non-profit status, along with simple instructions to follow as you fill them out.

Applying for a Solicitation License or an Amusement License

If your affiliate plans to raise more than \$25,000 in contributions in a given year, you must apply for a Solicitation

Member to Member Organization Makes Our Small Affiliate a Big Success



by Lucille Clontz, President
NAMI Union County

We have 12 members, with five or six attending meetings regularly. Although we are small in number, the help and hope we give each other is our greatest success story.

Our decisions to elect officers and to separate our educational and support meetings are the keys to our accomplishments. We especially appreciated the advice and encouragement we received from Board member Ernest Shumacher in making these decisions.

Another way we leverage our small size is through mutual support and collaboration with Union House, our local clubhouse. Clubhouse Director Jim Shaw chairs our affiliate program committee. We've worked together on social events and a Food Lion-sponsored fund-raiser. Our current joint project is a yard sale to be held at the clubhouse.

For more information, contact Lucille Clontz at 704 882-1293.

License. If your affiliate stages an event for which you charge admission, you must secure an Amusement License and pay a tax on gross receipts. Contact the state office for details.

What Affiliate Officers & Board Members Do



Virtually all affiliates elect officers, including—

- President
- Vice-president (*Note: Some affiliates elect a first and second vice president.*)
- Secretary
- Treasurer

Normally, one person serves in each office, but in several of our affiliates, two members share an office. In addition to electing officers, your members may also elect at-large board members to represent them on your affiliate's Board of Directors.

What the Board of Directors Does

- Prepares and submits affiliate bylaws for member approval
- Establishes goals, priorities and strategic plans for the affiliate
- Determines how the affiliate spends its money
- Develops general policies and procedures for operating the affiliate
- Establishes committees and appoints committee heads
- Creates task forces to handle special projects
- Helps members develop leadership skills to qualify them to hold affiliate offices and encourages turnover among affiliate leaders

All officers and directors are expected to—

- Understand the affiliate's mission, services, policies and programs.

- Identify key political issues and decide how the affiliate will address them.
 - Establish policies for the affiliate's relationships with area mental health programs and other organizations with similar interests and goals.
 - Develop policies for support the affiliate will provide to individual members.
 - Set policies for length of officers' terms, elections and other operational matters.
 - Attend and participate in all board and membership meetings.
 - Attend affiliate functions and special events.
 - Serve on committees that can benefit from the board member's expertise
- Oversees affiliate operations to make sure essential tasks are getting done.
 - Serves as the affiliate's primary contact with the state and national organizations.
 - Reviews and responds promptly to mail and messages from NAMI North Carolina and NAMI.
 - Acts as the spokesperson for the affiliate.

What the President Does

- Works with other officers and board members to develop long-range plans and set priorities for the affiliate.
- Plans, schedules and presides over board and affiliate business meetings.
- Heads the affiliate's executive committee.
- Calls special meetings when needed.
- Appoints members to chair affiliate committees.

What the Vice President Does

- Attends all board meetings.
- Serves on the executive committee.
- Manages special projects as requested by the president.
- Takes over the president's responsibilities when the president is absent.

What the Secretary Does

- Attends all board meetings.
- Serves on the executive committee.
- Notifies members about upcoming meetings.
- Records and reports minutes of all affiliate board, executive committee and business meetings.

- Takes on the president's responsibilities when the president and vice president are both absent.

What the Treasurer Does

- Keeps the affiliate's financial records.
- Reports financial information to officers, directors and members.
- Prepares operating budgets and monitors spending.
- Collects dues and other affiliate revenues.
- Forwards dues collected from affiliate members for NAMI and NAMI North Carolina, along with a statement showing the exact amounts due to the state and national organization by December of each year.
- Manages member records.
- Supplies NAMI North Carolina with current information, including members to be added or deleted from the affiliate roster and address changes.
- Notifies NAMI North Carolina promptly of changes in affiliate officers or contact persons.
- Collects and classifies donations to the affiliate as gifts from individuals, gifts from organizations or grants.
- Pays bills.
- Files appropriate tax forms and reports.

Notes for Board Members About Those Bylaws

- Consider limiting officers and members to two consecutive terms.
- Consider requiring officers and members to take a year off from holding office after serving two consecutive terms. (Of course, these former board members can head committees and task forces during their year off from the board.)
- Stagger terms of service so that one half or one third of the board members are elected every one or two years for terms of two to three years.

Notes for Officers & Board Members About Those Goals, Priorities & Strategic Plans

- Survey your members annually to find out what programs and projects they want and need most.
- Include questions about skills, interests and the types of tasks and projects members want to work on.
- Schedule a planning retreat soon after your affiliate elects its officers and board members.
- Make general long-range plans for membership growth, program growth and funding growth you anticipate during the next year or two.

- Discuss and reach consensus on your affiliate's three most important priorities. Make strategic plans and allocate affiliate resources to address your affiliate's priorities.
- Make specific plans for programs, projects and activities during the upcoming year.
- Outline responsibilities and tasks for the upcoming quarter and identify the member(s) who will see that they get done.

The NAMI North Carolina staff is available to facilitate your planning retreat and provide other support as needed for your strategic planning. Call Membership Development Coordinator Beth Greb for more information.

Notes for Officers, Board Members & Committee Heads About Those Responsibilities & Tasks

In the smallest of our affiliates, the officers *are* the members—all of them. For those officer-members, being *responsible* for a task means *doing* the task.

Ideally, for the rest of our affiliate leaders, accepting responsibility for seeing that a task gets done means breaking it down into manageable chunks and *delegating tasks to members*.

Why is delegation so important? Here are a few of the many reasons:

- Delegation allows affiliate members to share the work—and the satisfaction that comes with working together on a successful project.
- Delegation allows more members a chance to be interested and involved in your affiliate. When a few officer-members keep all the responsibilities *and all the tasks* to themselves, newer members or those who feel outside your affiliate's "inner circle" lose interest.
- Delegation helps minimize the burnout that comes when too few members take on too much work.
- Delegation allows your members opportunities to develop the knowledge and skills they need to head committees and hold offices. This is how your affiliate develops new leaders.
- Delegation of tasks frees officers to concentrate on leading and managing the affiliate. By shifting from a task orientation to a leadership orientation, your officers and board members can concentrate more on planning, setting goals and establishing priorities.

Member-to-Member How We Run Our Affiliate



by Dorothy James, President
NAMI Rockingham County

Organization and shared responsibility are the keys to keeping our affiliate running smoothly. We have also found our operations benefit greatly from keeping meetings focused on a single purpose. By separating education meetings, support meetings, Family-to-Family education and affiliate business meetings, we're able to accomplish so much more at each meeting.

Every one of the ten to twelve members who attend meetings with some regularity has a responsibility. Besides helping things run better, the involvement makes people feel they are giving something back to the group as well as receiving support in expressing concerns about their loved ones.

Although our group's size is modest, we are well-organized. We have a telephone tree in place, and we publish a newsletter to keep our members informed. Other areas of responsibility for our members include organizing social events, providing member services and advocating our cause with legislators. Our pioneer Family-to-Family teacher, Virginia Morton, now facilitates our support group. Carol Matthieu and Maude and Joe Brumbeloe will teach a Family-to-Family course this fall.

For information, contact Dorothy James at 336 548-5112.

Notes for Officers About Those Meetings You're Supposed to Run

- Keep meetings focused on a single purpose—education or support or affiliate business. Schedule separate sessions for each function.

- Prepare a simple written agenda for meetings and stick to it. If possible, mail, fax or email a copy of the agenda to meeting participants in advance.

Notes for Treasurers

About Those Dues You're Supposed to Collect

- Mail members the first dues notice in early September, followed by a second reminder by mail in October.
- When the time comes in December to submit your roster and dues to the state office, you may still have members of longstanding who have not yet paid up. Your board may want to place some last-minute telephone calls before removing those names from the roster.
- NAMI does not pro-rate dues, so regardless of what time of year a new member joins your affiliate, NAMI dues are still \$7—even if there are only a few months left before it's time to renew memberships.
- NAMI North Carolina's policy is somewhat more flexible. New members of your affiliate who join after July 1 can receive "Clippings" for the remainder of the membership year without paying the \$5 state dues. We recommend you adopt a similar policy at the affiliate level.

- We encourage you to submit your annual dues and current member rosters promptly to make sure your members' subscriptions to the state and national newsletters are not interrupted.

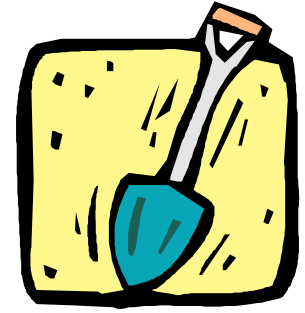
About Those Books & Records You're Supposed to Keep

- Keep accurate records of the income your affiliate receives, the money it spends, the value of any assets it owns and the amount of any money it owes.
- See the "Nuts & Bolts" Section for a suggested chart of accounts.
- Add new members immediately to your affiliate's mailing list for newsletters and meeting notices.
- Develop a system for promptly updating member records as members' addresses and other information changes.
- Develop a system for sharing current member information within your affiliate and with NAMI North Carolina.
- See the "Nuts & Bolts" Section for a suggested member database design.

About That Budget You're Supposed to Prepare

- As the end of your affiliate's fiscal year approaches, begin work on a budget for the upcoming year, using financial records from previous years as a guide.
- Provide past financial reports to your affiliate's board, committee heads and program coordinators to use as a guide and ask each of them to prepare a proposed budget for the coming year's income and expenses in their areas of responsibility.
- If your affiliate plans to recruit new members, be sure to factor in the additional variable costs to serve them, such as increases in newsletter printing quantities, postage and refreshments.
- Keep financial records up to date and review them at least quarterly. Compare actual income and expenditures to budgeted amounts and make adjustments as needed.

How Affiliates Get Things Done



Most of the work of our affiliates gets planned, organized and accomplished by committees. Your board decides how many committees your affiliate needs and their leaders, sizes, names and areas of responsibility, based on available personnel and service priorities.

How your affiliate organizes and assigns jobs is up to your board. The important thing is to get the jobs done. To help your members do their jobs better, please share with them the appropriate lists of tasks, notes and tips which follow.

Notes for Committee Heads Making Committee Assignments

- As committee chairperson, your job is to plan programs and projects and see *that tasks get done* on schedule.
- You are not expected to do all the tasks yourself. Instead, give members a chance to get involved by taking on specific task assignments.
- Recruit enough committee members to handle tasks comfortably.
- Assign tasks so that all committee members get to make a meaningful, manageable contribution to the program or project.
- Assign tasks based on members' experience, skills, interests and available time.
- Prepare written lists of responsibilities, guidelines and goals for committee members.
- Check with members regularly to see that work is proceeding on schedule.

Committees Providing Support Services

The committee or committees in charge of your affiliate's various support services are responsible for functions including—

- Appointing one or more members to serve as the affiliate contact.
- Appointing additional referral contacts within your affiliate to support young families and consumers.
- Seeing that interested affiliate members participate in Family-to-Family Support training to prepare affiliate members to lead support groups.
- Organizing ongoing Family-to-Family support groups led by trained facilitators.
- Organizing ongoing support groups run by and for mental health care consumers.

What the Affiliate Contact Does

- Answers all calls to the affiliate's contact number within 24 hours.
- Understands support services offered by the affiliate and promotes them to callers by inviting them to attend an

upcoming support group meeting.

- Knows about the affiliate's upcoming educational programs and, when appropriate, invites the caller to attend.
- Researches and develops relationships with local and area mental health care providers and agencies for referrals.
- Provides basic information to the caller about available resources.
- Refers the caller to other individuals and organizations as needed.
- Consults with NAMI North Carolina Helpline Coordinator Gloria Harrison as needed to solve callers' problems.
- Mails the affiliate's brochure to callers.
- Records callers' names and contact information to be added to the affiliate's mailing list.

How you handle your response to the first contact determines the caller's first and lasting impression of our entire organization. In a crisis, your ability to respond quickly and effectively to a caller who needs immediate help can even save lives.

Besides helping callers solve problems, the affiliate contact is critical to the long-term health and vitality of the affiliate. The vast majority of NAMI members initially contact our organization for support.

Whether the caller ultimately becomes a productive affiliate member often depends on the quality of your affiliate's telephone support services.

If you provide excellent support services at this early stage, you'll be laying the groundwork for your affiliate's future growth and success.

Notes for Affiliate Contacts About Getting the Job Done

If you agree to be the affiliate contact—

- You must be willing to receive telephone calls.
- You must be knowledgeable about community services and referral procedures.
- You must be accessible most of the time.
- You must be willing to see that callers receive appropriate support materials, such as brochures and newsletters.
- If you are away from your telephone often or for hours at a time, you need an answering machine or voice mail service. Return calls as promptly as possible.
- Some affiliates have two or three contact persons who share responsibility for responding to inquiries.

- A natural division of labor could be between a telephone contact, a U.S. mail contact and an email contact.
- You may prefer to allocate responsibilities based on the contact person's knowledge or experiences with a particular disorder.
- You may assign one contact person to handle questions concerning adults with mental illness and another to handle questions from parents of children and adolescents with severe emotional disorders and mental illnesses.

Notes for Affiliate Contacts About Those Questions You're Supposed to Answer

- Your first message to callers should be, "You are not alone."
- Listen patiently and sympathetically to callers' problems and concerns. For some callers, simply talking to another person who understands is their reason for contacting you.
- Besides listening to and comforting callers, you have a job to do for your affiliate as well. Before hanging up, you need to have—
 - Written down the caller's name, telephone number and mailing address.
 - Offered to mail a brochure.
 - Offered to add the caller to the newsletter mailing list.
 - Described all affiliate services that might be helpful to the caller.
 - Invited the caller to attend an upcoming meeting.

You're not expected to know the answers to all the callers' questions. You just have to know which people and organizations *do* have the answers. Your job is to refer the callers to the best sources of help.

- Many callers have first contacted the state office through the toll-free Helpline. Our staff has suggested they call you for help with accessing local services, including those of your affiliate. That's why it's especially important for you to learn as much as you can about local resources.
- Much of the information you need is in the *NAMI North Carolina Help Book*. We strongly recommend you read the *Help Book* and keep it near the telephone so you can give callers telephone numbers and other information they need immediately.
- To supplement the state and national contact names and numbers from the *Help Book*, we suggest you keep your own list of local referral contacts and affiliate members willing to provide telephone support in their areas of experience or expertise.
- You can always call the Helpline yourself on behalf of callers to your local contact number for suggestions on how to answer more difficult questions.
- After you conclude the call, get any materials you said you'd send into the mail and on their way to the caller.
- Pass the caller's name and address along to the member

who maintains your mailing list.

- Follow up with the caller as needed.

Contact Membership Coordinator Beth Greb to request a package of materials developed expressly to help make your job as Affiliate Contact easier and more effective.

What Family-to-Family Support Group Coordinators Do

- Organize and conduct support group meetings.
- Make sure a trained Family-to-Family facilitator is available to lead all meetings.
- Encourage experienced affiliate members to attend and share their insights at support group meetings.
- Encourage facilitators to review their Family-to-Family Training Manual from time to time to keep their skills sharp.

What Young Families Mentors Do

- Participate in the Young Families program training for mentors.
- Help young families understand and access the services they need.

Committees Providing Education Services

Here are some of the responsibilities and tasks for the committee or committees your board appoints to help provide education services—

Member to Member Would a Young Family Find Your Affiliate Welcoming?



by Diane Weaver
NAMI Four Seasons

As one of the few young family members in my area, I am often asked how an affiliate can prepare itself to include young families. I am amazed to find that knowledgeable, supportive members do not realize how much they already offer a family struggling with a childhood-onset brain disorder. The unique features of childhood-onset disorders are easy to learn, and ample resources are available by phone. Here are some tips:

Realize that your affiliate already has much to offer young families. You are perhaps the first people the parents have met who believe they did not cause the disorder. Well-meaning professionals, friends, and relatives have been bombarding these parents with advice, not realizing the child's disorder is biologically-based. NAMI affiliate members know that unsolicited parenting advice is inappropriate.

Your example, empathy, and caring are healing for these distraught parents. Listen, affirm, and support, as you would any newcomer. You understand the mental health system and SSI. These parents probably need guidance navigating the systems.

You understand the need for persistence in pursuing the right mix of medications and dealing with side-effects. This is often a discouraging process for young families. Your longer-range perspective is valuable.

Don't worry about overwhelming or shocking young families with the symptoms or treatment issues of late-adolescent- or adult-onset disorders. These families probably have some stories that would curl your hair! Childhood-onset disorders are severe and continuous. The parents are already dealing with several of the following:

- Impulsiveness
- Continuous mixed mania
- Depression
- Suicidal tendencies
- Runaway attempts
- Psychoses
- Obsessions
- Grandiosity
- Tics
- Compulsions
- Rages

- Recognizes and responds to members' varying needs by planning both basic educational programs for newer members and more advanced programs for established members.
- Plans special events to educate the general public about mental illness.
- Recruits affiliate members to take the Family-to-Family Education course training and present the 12-week course in your community.
- Identifies and plans educational programs for people, groups and agencies in the community who often deal with mentally ill people and their families.
- Recruits members to receive training to present the Science & Treatment Program to area church, business and civic groups.
- Tracks news and researches current information on mental illnesses and their treatment.
- Collects books, brochures, fact sheets and copies of relevant news and feature stories and makes them available to members and prospective members through the affiliate's lending library.
- Provides the affiliate contact with a current list of library resources and sends them to callers as requested by the affiliate contact.
- Provides members of the Advocacy Committee with a current list of library resources and sends them to legislators as needed.
- Recommends and/or supplies resources to the local public library.

Stock NAMI and NAMI North Carolina brochures on childhood-onset disorders, such as mood disorders, anxiety disorders, behavioral disorders (ADHD, oppositional-defiant disorder, conduct disorder), Asperger Disorder, and Tourette's Syndrome. Include information from these brochures or other reliable sources in every affiliate newsletter. An excellent reference is Harold S. Koplewicz's book, *It's Nobody's Fault*, available through NAMI, at your library, and at many bookstores.

Remember the NAMI North Carolina Help Book! Give the family a copy of this invaluable reference and point out sections on child and adolescent disorders, educational issues, services, and Willie M.

Ask the family to join the affiliate and enroll them in the statewide Young Families Network by calling the NAMI North Carolina's Helpline at 800 451-9682. The state office can pair the family for telephone support with another young family elsewhere in the state, if requested. NAMI North Carolina Spring Conferences feature workshops for young families. Call NAMI at 800 950-NAMI to add the family to our national organization's mailing list for the newsletter, "Because Kids Grow Up."

Refer parents to the Exceptional Children's Assistance Center (ECAC) at 800 962-6817 for free, expert guidance on strategies to get a "free and appropriate" education for the child. They may call parent coaches at ECAC as many times as needed to clarify the confusing IEP (Individual Education Plan) process. ECAC will send them a packet of materials and also has an excellent newsletter and lending library.

Sometimes a school expels a child for behavior related to the brain disorder. This is illegal. The school must come up with an adequate positive behavioral plan, including accommodations to allow that child to participate successfully. Self-contained "BEH" (Behaviorally-Emotionally Handicapped) rooms are generally not an appropriate placement and may actually worsen the child's condition. For help, call the Governor's Advocacy Council for Person's with Disabilities (GACPD) at 800 821-6922 for expert advice and support.

Consumers can help younger children and adolescents by sharing coping strategies (when asked) with them and their families. Consumer insight into the illnesses is invaluable to parents trying to understand their child's

Advocacy at the Affiliate Level

Your board appoints a legislative contact for your affiliate to receive and pass along information from the state and national offices concerning political issues, key legislative events and votes.

Among the legislative contact's suggested tasks—

- Passes along information and recommendations for appropriate actions from NAMI and NAMI North Carolina to members.
- Cultivates direct, personal relationships with their representatives and senators from both parties in the North Carolina General Assembly and United States Congress. Ideally, you should be able to call a legislator's office and have the staff and the legislator recognize your name and recall your association with NAMI North Carolina.
- Follows actions by city and county governments and local agencies and alerts the state office staff to events and situations of concern within the community.

A Legislative Manual is available on request from the state office as a supplement to the Tool Kit. NAMI North Carolina also offers Leadership Academy, a training program to teach interested affiliate members how to be more effective advocates.

puzzling behaviors. Your affiliate's consumer members embody hope that this child can grow up and manage the illness.

During a crisis, the younger family may need help with involuntary commitment, transportation, or care of another child or children. There may also be times—when changing medications, for example—when it is best for the child to stay out of school for a few days. If the parents work, they may need care for the child during these times. Any help affiliate members can offer is a blessing to these families.

It is wrenching to leave a child in a locked mental ward or to seek residential placement. These are times of profound grief, isolation, and self-doubt. A telephone call, dinner invitation, or home-cooked meal combined with a listening, nonjudgmental ear may ease the family's isolation and help them process the grief. Many times these families cannot tell relatives, neighbors, coworkers, or church members. You can be of tremendous support.

In conclusion, I hope I have convinced you that your affiliate could be a haven for young families, no matter the age of the present members. State and national child and adolescent coordinators stand ready to give you all the technical assistance you need. The warmth and hospitality are up to you.

Notes for Legislative Contacts Helping Affiliate Members Understand the Issues

- While the state office is responsible for helping you understand critical issues, you are responsible for helping your affiliate members understand them.
- Most important issues of statewide interest are covered in "Clippings" or in "Legislative Alerts."

- If you have questions or don't understand an issue, call the state office staff and ask for an explanation.

Affiliate Fund Raising

One or more of your affiliate committees handles these fund-raising tasks—

- Plans and organizes fund-raising events
- Researches business and community foundations

- Prepares and submits grant proposals
- Allocates a portion of proceeds to support NAMI North Carolina.

Notes for Affiliate Fund Raisers About Those Special Events

- Fund-raising events can be strictly for raising money, or they can combine fund-raising with education.
- Types of special events and fund raising projects your affiliate might sponsor include—
 - Campaigns to sell greeting cards, gift-wrapping paper, art, plants and bulbs, concessions at special events, doughnuts, candy or other merchandise
 - Raffles
 - Dinner dances
 - Golf or tennis tournaments

Committees Providing Member Services

Your board may create committees and task forces or appoint individual members to handle these member services tasks—

- Recruit new members for the affiliate and help them get involved in affiliate activities.
- Encourage current members to renew their memberships.
- Publish the affiliate newsletter.
- Organize a telephone tree to get urgent messages to members quickly.
- Find suitable locations for meetings.

- Welcome visitors to meetings.
- Provide refreshments for meetings.
- Prepare, distribute and report to the board on the annual member survey.

Member to Member Taking it to the Streets

by Dan & Betty Lane
Western Carolina AMI



A year ago, by responding creatively to a routine invitation, thinking big and taking risks, Western Carolina AMI took NAMI's Campaign to End Discrimination directly to an estimated 1,000 citizens of Asheville.

As one of many community groups asked to participate in Asheville's 1997 Bicentennial Celebration, our 150-member affiliate planned and implemented a series of successful centennial events honoring well-known people with mental illness who had contributed to Asheville's history.

Drawing on the time, talent and expertise of our members, we created a planning committee of 12, headed by Maggie O'Connor, a historic preservationist for the City of Asheville. A member who works for the local newspaper helped with publicity. Many of our consumer members were involved at all levels of the effort, presenting skits and helping with publicity.

Our special events featured such figures as author Thomas Wolfe, actress and author Zelda Fitzgerald, landscape designer William Olmstead and American Cherokee Chief Will Thomas. From Cherokee, North Carolina, we brought in and displayed a large wall mural created by Native American children suffering from mental illness. We sponsored a highly successful "Mad Hatter Tea Party" based on Zelda Fitzgerald's illustrations for Alice in Wonderland. Dan Lane contributed his expertise as a historian, writing and producing two one-act plays.

We believe the results of our efforts were well worth the hard work required. NAMI agreed, recognizing our efforts at the July 1998 national convention.

For information, contact Dan and Betty Lane at 828 456-3024.

- Organize a nominating committee or task force to develop a slate of officers each year.

Contact the state office to request a copy of “Publishing Your Affiliate’s Newsletter,” a supplement to the Tool Kit especially for editors.

Member Services Notes About Recruiting New Members & Retaining Current Ones

- Work with the affiliate contact to see that everyone who approaches your affiliate receives a brochure containing descriptions of affiliate services and a membership application.
- Work with the treasurer to encourage current members to send in their dues.
- Talk informally to members about their levels of satisfaction with the services they are receiving and pass along any noteworthy comments to the appropriate committee head.
- Contact members who drop out of groups or stop attending meetings to determine if they need the affiliate’s help. Try to determine if they dropped out for a particular reason and if possible, try to help resolve any misunderstandings and encourage them to return.

Member Services Notes About Your Meeting Facility

- Having support meetings and general meetings in the same place simplifies things.
- Ideally, the facility you choose will accommodate small support groups as well as large educational programs.
- Libraries and churches are often willing to provide meeting space for nonprofit groups.

Member to Member Lunch with ‘Les Girls’

by Beth Greb
NAMI Wake County



Feeling kind of down in the doldrums or just wanting a good chat with friends? Come to lunch with “Les Girls,” Wake County’s women’s luncheon club.

Begun about five years ago by a mother whose mentally ill daughter was lonely and socially isolated, the luncheon group meets an important need for support in a pleasant social setting. “Les Girls” meets on Saturday once a month for a buffet lunch at a local restaurant. The dress is casual, and no reservations are required.

Originally directed to consumers, “Les Girls” now attracts a cross-section of about 35 women who attend from time to time. Birthdays are remembered, and door prizes (costing less than \$5) add to the fun. We keep a list of attendees and call them monthly to remind them of an upcoming luncheon—a key to the group’s success. The callers are volunteers who signed up at the beginning of the year to do the calling for a particular month. Our volunteer coordinator prepares the sign-up sheet and reminds each volunteer when the time comes for them to make their calls.

“Les Girls” provides a great social outlet and gives us a chance to meet a variety of consumers on a social level. Many of us who are not consumers see mental illness from the personal perspective of our own family members. By exposing us to other consumers, “Les Girls” has reduced the stigma among our affiliate members who have come to see the consumers in our group as friends.

For information, contact Beth Greb at 919 846-8180.

- Once you've found a good meeting place, stick with it. Changing meeting locations can be confusing to participants and may result in loss of members.

Notes for New Member Contacts Integrating New Members into the Affiliate

- Most affiliates function somewhat as a family unit. The bond that develops among affiliate members of longstanding is closer than friendship.
- Members of your affiliate "family" may unintentionally slight newcomers who sense the close ties and feel left out.
- Assign a member to greet and introduce visitors and new members at meetings.
- Remind members to help make newcomers' experiences with the affiliate positive and helpful.
- Determine the newcomer's needs, interests and skills and encourage the appropriate committee head to invite him or her to join a committee.
- Consider assigning a mentor to help the newcomer get involved.
- Remember some newcomers take longer to become part of the group than others. Don't pressure newcomers into joining committees before they're ready.

Notes for Member Services Issuing Alerts to Affiliate Members

- From time to time, the affiliate's legislative contact will need to issue a Legislative Alert to all affiliate members.
- Alerts from the state office to the legislative contact are bare-bones directives for action. They assume the legislative contact fully understands the issues involved.
- The legislative contact is responsible for educating affiliate members about the issues.
- With help from the legislative contact, make sure the telephone tree volunteers who help get the word out to your members understand the issues well enough to answer basic questions about the call to action.

Community Relations for Your Affiliate

Sometimes referred to as a public relations or public affairs function, the community relations tasks your affiliate undertakes may include—

- Establishing and maintaining mutually beneficial relationships with selected individuals and organizations in the community.
- Drafting letters to editors of area newspapers to address key issues.
- Drafting news releases about affiliate programs, services and special events.

- Coordinating the affiliate's participation in community special events.
- Organizing and operating a Speakers Bureau for the affiliate.
- Encouraging interested members to receive training to present the Science & Treatment Kit program for business and civic groups.
- Encouraging interested members to become trained instructors for the Young Families program to teach educators about working with students who have severe emotional disorders and mental illnesses.

Community Relations Notes About Your Affiliate's Relationship with Your Area Mental Health Authority

- The best measure of the effectiveness of your affiliate's community relations effort is your relationship with your Area Mental Health Authority.
- In dealing with authority staff members, remember they are usually overworked and underpaid.
- Unless you have clear, unquestionable evidence to the contrary, give authority staff members the benefit of the doubt and assume they have consumers' and families' best interests at heart.
- Remember it is to your benefit and in the best interests of the mental health care consumers you represent to maintain good, productive relationships with staff members.

- Encourage staff members to refer prospective members to your affiliate.
- Take a positive, problem-solving approach when you have questions or are lodging complaints.
- Try to find ways you can work together to resolve problems to everyone's satisfaction.
- Don't limit your contact with authority staff members to complaints. Be sure to pass along compliments and thank them when you hear they've been especially helpful to an affiliate member.
- Identify common goals, such as better funding for mental health care services in your community, and work cooperatively to achieve them.
- Ask staff members to suggest projects your affiliate could undertake to help them provide better care for consumers.

Community Relations Notes About Your Affiliate's Contacts with Advocacy Groups

- As a NAMI North Carolina affiliate, you have much in common with local chapters of other groups, such as the Mental Health Association, the Psychiatric Association, the Psychological Association, and the Mental Health Consumers' Organization.
- While NAMI shares many goals with these organizations, there are definite, sometimes subtle differences in philosophies, mission and opinions about the

best approaches to achieving those goals. Here are a few examples of differences—

- The Alzheimer's Disease Association does not refer to Alzheimer's as a mental illness, even though Alzheimer's is a biologically-based disease of the brain.
- The Epilepsy Association does not refer to epilepsy as a mental illness, although epilepsy can cause symptoms of mental illness.
- The Mental Health Association, the Psychiatric Association, and the Psychological Association are committed to addressing all sorts of emotional disturbances, as well as illnesses designated as severe and persistent. They advocate for talk therapy for those suffering personal difficulties (whose crises may indeed be debilitating) with the same zeal as they advocate for services for those individuals who have severe and persistent mental illness.
- The Head Injury Foundation does not refer to their clients as having mental illness, although they might have the same symptoms as persons with mental illness. They do not offer services to individuals who suffered brain damage before birth who may also have mental illness resulting from that brain damage.

To work most effectively with other groups, your affiliate must understand and acknowledge key differences between those groups and NAMI.

Community Relations Notes About Those Other Community Contacts

- Identify people in your community who come in frequent contact with mental health care consumers and their families and establish relationships with them.
- Before you approach potential community contacts, think through the benefits of a relationship with your affiliate from the prospective contact's perspective.
- Emphasize the benefits your affiliate can provide to the individual or organization when you approach a potential contact.
- Provide community contacts with clear, concise information about your affiliate's services. Ask your newsletter editor to put the community contact on the mailing list and ask to be placed on the contact's mailing list.
- Follow up with contacts periodically.

Community Relations Notes About Those Media Contacts

- Contact area newspapers and television news departments to compile a list of health and medical reporters, features editors and community calendar editors by name.
- Develop some basic fact sheets listing officers' names, contact information, services provided, a brief description of your mission and purpose, highlights of your history, etc. Providing this information in writing helps cut down on errors, misspelled names and misleading or incomplete program descriptions.
- Bring major news concerning mental illness to media contacts' attention with a brief call or letter.
- Offer to provide more information if they're interested, and if you say you'll send information, do so promptly.
- Refer reporters to the state or national office when appropriate, or get the information the reporter needs from the state or national office yourself and forward it to the reporter.
- Be prepared to respond immediately to requests from editors and reporters working on deadline.
- After publication or broadcast, send a thank you note to editors and reporters who cover your events or use your story ideas.

Managing Basic Affiliate Operations

Whether your affiliate has five members or 50, the basics of organizing and operating your affiliate effectively are the same.

On a practical level, we recommend you approach affiliate operations as if you were running a business. Naturally, the NAMI North Carolina staff will support your efforts every step of the way.

Ongoing Affiliate Communications

Like any organization, your affiliate needs to communicate effectively with your own members and with other groups and individuals.

We encourage you to establish some simple procedures for making sure important information gets to the right people at the right time within your organization, between your organization and other organizations—especially NAMI North Carolina, and with individuals your affiliate serves.

Your internal communications network should include—

- Officers and board members
- Affiliate contacts
- Committee heads
- Affiliate members
- The affiliate newsletter editor
- Prospective affiliate members

We recommend appointing a communications task force to determine who needs to know what when and to develop a simple system to keep information flowing within your affiliate. Task force members should include an officer or board member, a committee head, the newsletter editor and a new member.

Your external communications network should include—

- The NAMI North Carolina staff
- Other community organizations with similar goals and services
- State legislators who represent your area
- Mental health care professionals in your community
- Families and individuals coping with mental illness in your community
- The general public

The communications task force should also develop simple policies and procedures for communicating with external audiences.

Ask your affiliate's president and treasurer to work with the task force to develop policies and

procedures for communications between your affiliate and NAMI North Carolina.

Ask your affiliate's community relations committee head to work with the task force to develop a simple system to keep key external audiences informed.

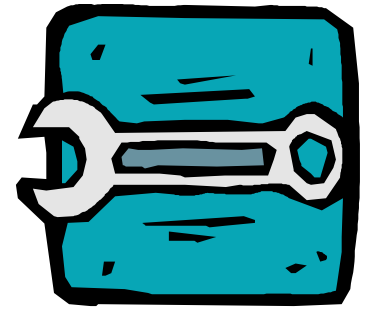
Have the task force work with your affiliate's legislative contact to develop a system for receiving and disseminating incoming information about legislation.

Bank Account

Your affiliate treasurer should open a basic checking account for the affiliate.

- Be sure you understand any service charges the bank will apply to account transactions. Although you will write relatively few checks, your bank deposits at dues time will consist of a number of checks, each of which may incur a service charge. Ask the bank to waive service charges altogether or, at least, to allow your affiliate to maintain a lower minimum balance to qualify for free checking.
- Save money by choosing wallet-sized checks instead of

Nuts & Bolts



the larger format commercial checks.

- If your treasurer keeps your affiliate's financial records by computer, you may prefer to order computer checks.

Post Office Box

A post office box is almost a must for any affiliate and is well worth the annual cost of \$40 or so.

Among the advantages—

- Your affiliate's mailing address will remain the same over time, even as affiliate contacts and officers change.
- You save the time and effort of notifying others every time your address changes.
- Frequent address changes can prevent you from receiving important mail from organizations using outdated mailing lists. You may even miss some mail from NAMI and NAMI North Carolina while your address change is being processed.
- Keeping the same mailing address helps extend the "shelf life" of printed material, such as affiliate stationery and brochures.

Once you have a post office box, be sure one of your members checks it at least weekly, and preferably more often—particularly when your members are mailing in their annual dues. Get duplicate keys from the post office for other members who need access to affiliate mail.

Financial Records

Among the accounts and sub-accounts your treasurer will want to establish—



Income

Family/Individual & Professional member dues income

Affiliate dues

NAMI and NAMI NC dues

Open Door dues income

Affiliate dues

NAMI and NAMI NC dues

Charitable contributions from individuals

Grants received

Proceeds from fund-raising events

Expenses

Affiliate operating expenses

Postage

Post office box rental

Printing

Telephone

Office supplies

Books, periodicals, tapes

Refreshments

Ongoing program expenses

Family to Family

Young Families

Clubhouse

Special projects/events expenses

Facilities rental

Advertising & promotion

Licenses or permits required by city and/or state

Contributions to NAMI North Carolina

Bulk Mail Permit

If your affiliate relies on mailings for most of its promotion, consider applying for a nonprofit mailing permit from the U.S. Postal Service. Initially, the permit costs \$85, plus \$85 per year. Each

piece of mail costs \$.135 for third class delivery, and there is a 200-piece minimum for each mailing.

Will bulk mailing pay off for your affiliate?

As the following comparison shows, once you've paid the initial \$85 application fee, your affiliate could double its monthly mailings from 100 to 200 pieces for only \$25 per year in additional postage costs, plus the costs of printing the extra materials.

First Class

- 100 pieces of mail per month @ .33 = \$396
- No permit required
- Annual postage expense \$396

Bulk Mail

- 200 pieces of mail per month @ \$.138 = \$331.20
- Permit \$85
- Annual postage expense \$416.20

Bulk mailings are cost-effective if your affiliate mails at least five batches of at least 200 pieces per year.

Given the savings over first class postage rates, it may be cost effective to add names of area health care professionals, service organizations, churches, civic groups, editors and reporters to your mailing list to reach the required minimum.

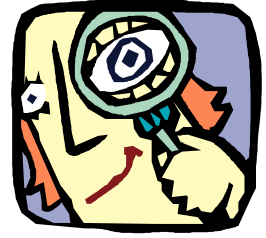
Your affiliate will also benefit from the additional exposure.

Keep in mind, however, third class mail may take longer than first class mail to reach its destination.

For more information, contact your local bulk mailing center of the U.S. Postal Service. They have everything you need to set up a bulk mailing account, along with detailed instructions on how to prepare mailings.

Member Records

Your treasurer maintains information on each membership, including the following—



Type of membership (Individual/Family, Professional or Open Door)

Member since (date)

Member 1 surname

Member 1 first name

Member 1 preferred title (Mr., Mrs., Ms., Dr., the Rev., etc.)

Professional title (for Professional Memberships)

Member 2

Member 3

Mailing address

City

State

ZIP code

Home telephone number

Email address

Facsimile number

Member 1 work telephone number

Member 2 work telephone number

Date of last dues payment

Amount of last dues payment

Next payment due date

Next dues payment amount

Total charitable contributions to affiliate to date

NAMI North Carolina thanks Sam Bryan of NAMI Durham County for his help with this section.

Before personal computers became so common, small businesses and organizations relied entirely on handwritten customer or member data and financial records in ledger books and journals. While it's certainly possible to maintain your member data and financial records entirely on paper, the tasks involved will be much easier to manage with the help of a computer.

Here are a few of the ways your affiliate can use a computer—

Word processing

- Meeting minutes
- General correspondence
- Newsletters (Most word processing programs support desktop publishing features suitable for newsletters.)

Database management

- Member records
- Donor records
- Bookkeeping and budgeting

Internet access

- Email to and from members
- Email to and from NAMI and NAMI North Carolina
- Special-interest email mailing lists dealing with various disorders and mental health issues
- Research on mental health issues at World Wide Web sites

Computer Support



Recommended Hardware

Computer specifications:

- IBM-compatible desktop running Windows 95 or Windows 98
- Minimum 166 megahertz Pentium or K6 processor
- Minimum 32 megabytes RAM (random access memory)
- Minimum 2 gigabyte hard drive CD ROM drive
- Speakers
- 56 kbs (kilobytes per second) modem
- Minimum 15" color monitor

In general, computer novices are better off buying computer equipment locally since, if anything goes wrong, you can return the equipment to the store. It's best to buy from dealers in business for at least five years with multiple locations.

If you are considering buying direct from a manufacturer, check computer magazines for service and quality ratings of the companies you are considering.

Before making your final decision, discuss your computer purchase via mail order versus a local retailer with your affiliate's computer expert.

An alternative to purchasing a new computer is to find a business or individual willing to donate equipment to your affiliate. Many companies that rely on demanding software applications replace nearly-new hardware that would be fine for your affiliate's needs.

You may want to consider a refurbished or used computer, but we recommend you buy used equipment only from a dealer or directly from a manufacturer who is willing to offer a warranty. Whether or not this option is viable for your affiliate depends at least in part on the skill level of your computer expert.

Recommended Software

Microsoft Works for Windows is the software we recommend to affiliates. Works includes word processing, database management and spreadsheet modules. The software is reasonably priced, and you'll find plenty of training materials available for Works at your local bookstore. Often, Works comes already installed on new computers.

Microsoft Money and **Quicken** are simple accounting programs designed for users who need to keep basic financial records. If your treasurer is familiar with financial accounting, he or she may prefer a full-featured accounting program, such as **QuickBooks**. Be sure to consult with your treasurer before you buy accounting software.

For complete access to the Internet, including flexible email, World Wide Web sites, newsgroups and other Internet resources, you will need an account with one of the dozens of Internet service providers, such as America Online or Mindspring.

If you or a friend have Internet access now, you can get a list of Internet Service Providers (ISPs) serving your area by visiting one of these World Wide Web sites:

<http://www.boardwatch.com>
<http://www.ispfinder.com>
<http://www.thelist.internet.com>

The Internet service provider you choose will supply you with the software you need to install on your computer to use the service.

Most services bill monthly—usually about \$20 for unlimited access. Some providers offer discounts to nonprofit organizations. Some even donate the account outright. It's worth asking.

Be sure to choose a provider who offers local telephone access and a toll-free customer service line.

Free Email

Several companies offer free email accounts, supported by advertising. When you check your email, you'll have to click through some ads before reaching your list of messages.

One of the best known providers of free email accounts is Juno.com. You can get a copy of the software you need by calling 800 654-JUNO. You'll be charged \$8.82 for shipping, so have your credit card handy. If you or a friend have Internet access, you can download the software for free.

Juno currently offers at least one local access number in these North Carolina cities:

- Burlington
- Chapel Hill
- Durham
- Fayetteville
- Goldsboro
- Greensboro
- Raleigh
- Rocky Mount
- Southern Pines
- Wilmington
- Winston-Salem

Unless you can call toll-free to one of these cities, you will have to pay long distance charges to use Juno's free email service.

Get Some Help

Despite what the television commercials suggest, there is more to using a personal computer than just plugging it in. We strongly recommend identifying an experienced computer user from among your members and asking him or her to serve as your affiliate's computer trainer and consultant.

If none of your affiliate members has the time and expertise you need, consider—

- A community volunteer
- A volunteer service bureau
- A civic club
- Boy Scouts or Girl Scouts
- A local computer club (check with a high school computer teacher)
- A high school computer whiz (ask the teacher)
- A college service fraternity
- Service Corps of Retired Executives (SCORE)

If you are unable to recruit a volunteer, consider hiring a high school student with computer skills. The student will probably work for a rather small fee and will appreciate the chance to show off his or her skills in a real-world application.

Many books are available to help novices learn to use Windows, Works and the Internet. Most programs include tutorials you can use to learn basic program features. There are also training videotapes and CD ROMs. Most community colleges offer computer courses for beginners.

Volunteer Planning Assistance

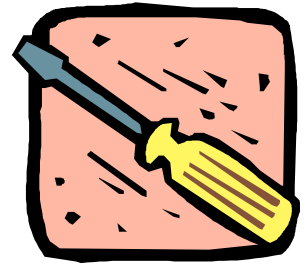
NAMI North Carolina member Sam Bryan of Durham has volunteered to consult with affiliates to help them plan their equipment and training materials purchases.

Please note: Sam is available to help you with planning only. He will not be available to provide ongoing support.

Contact Sam Bryan at 3408 Dover Road, Durham, NC 27707, 919 403-9389. His email address is sambryan@mindspring.com.

Sam prefers to hear from you via email. If you contact Sam by telephone, please call between 3:00 and 5:00 p.m. The number has voice mail.

When It's Time for a Tune Up



It's natural for long-time members to have a strong sense of ownership in their affiliate. Often, they've devoted many hours in the early days of establishing the affiliate. They may have served as president since the affiliate's founding, or they may have held every office at one time or another. Their dedication to the affiliate is beyond question.

Unfortunately, the closeness and familiarity these members share can sometimes, over time, cause their affiliate to stagnate. Newcomers feel unwelcome. Members outside the inner circle lose interest, feeling their ideas will not be accepted.

When an affiliate stagnates and fails to function as a service organization should, the community is deprived of the support, education and advocacy services they need.

Of course, socializing with the friends you've made in your affiliate is fine so long as you make it a point at affiliate meetings and events to include new NAMI friends and make them feel welcome. Remember, your purpose as an affiliate member is to help support others with needs similar to the ones you had when you first got involved with your NAMI affiliate.

If you suspect your affiliate needs a tune-up, NAMI North Carolina understands and wants to help. We will gladly send a staff member to meet with your

group to help you formulate an action plan to revitalize your affiliate and redefine your roles within it. Contact Membership Development Coordinator Beth Greb for help.

Signs Your Affiliate Needs a Tune-Up

- The same people serve as officers year after year.
- If one of your officers becomes ill or leaves town for more than a day or two, you have no back-up, and important affiliate operations grind to a halt.
- Membership numbers are low, static or declining.
- First-time visitors to your meetings leave early and never come back again.
- While you may have support group meetings, you no longer have regular business or educational meetings, or the meetings you have are poorly attended.
- Your telephone contact person has stopped returning calls.
- None of your members has spoken with a state office staff member in recent memory.
- Your local Mental Health Authority has never heard of your group.

Signs Your Tune-Up Worked

- Membership is growing steadily.
- Your membership includes a mix of newcomers, experienced members and seasoned affiliate veterans.
- Mental health care providers refer families and consumers to you for help.
- Your Board of Directors varies from year to year to include a variety of members.
- Board members and committee heads delegate as many tasks as possible to give more members a chance to be involved.
- You offer support groups that meet regularly.
- You have monthly educational meetings.
- You have a monthly newsletter.
- You know the people at your area mental health authority and they know you. One or more of your members may serve on the authority's board.
- You conduct fund-raising events.
- Your contact person returns all calls within 24 hours.
- You have a means for contacting members quickly to respond to Alerts.

NAMI North Carolina Bylaws



Article I Purpose

To promote the quality of care, rights and interests of mentally ill citizens, particularly of those who cannot speak for themselves, and to advocate such policies at the local, state and national levels to ensure accomplishment of these objectives.

The active promotion of a high quality no-eject continuum of care from state hospitals through various community facilities and support programs for persons who have prolonged mental illness.

The active promotion of housing with varying degrees of supervision for individuals suffering from mental illness.

The promotion of job training and low stress employment—voluntary or paid—to help the mentally disabled person become as self-sufficient as possible and to promote his or her self esteem.

To support and advocate research into the causes, alleviation, and eradication of mental illness.

To develop an enlightened and more sympathetic public understanding of the problems of those afflicted with mental illness and increase awareness of the public responsibilities in dealing with these problems.

To monitor existing health care facilities, staff, and programming

for adequacy and accountability, and to influence the professional and the continuing education of mental health service providers.

To improve communication and cooperation between mental health agencies and the families of mentally ill citizens.

To encourage and aid in the formation of affiliate groups and growth of membership throughout the State of North Carolina.

To facilitate support and sharing activities for affiliates and their members.

To inform affiliates and their members of relevant information on research findings.

To serve as an information, collection, and dissemination center for affiliated organizations within the State of North Carolina.

To solicit, receive, and contribute funds for the above-stated objectives.

This Corporation will have the purposes and powers as may be stated in the Articles of Incorporation, and such powers

as are now or may be granted hereafter by law.

Article II Membership

Section 1. Type of Members.

There shall be two (2) types of members: (a) Voting, and (b) Non-Voting.

Section 2. Voting Members.

Voting members shall consist of individual/family members (“I/FMs”) and local Affiliates (“Affiliates”) that accept the mission of NAMI North Carolina and pay the annual dues in the amount and manner established from time to time for voting members by resolutions of the Board of Directors of NAMI North Carolina and of the Board of Directors of the National Alliance for the Mentally Ill (“NAMI”).

(I) Individual/Family Members (“I/FMs”)

(a) Definition—An I/FM is a family of one or more persons (as defined by the NAMI Board) who accepts the mission of NAMI North Carolina and NAMI, and has paid dues to an Affiliate (or whose dues have been formally waived by that

Affiliate) and for whom annual dues shall have been paid by its Affiliate to NAMI North Carolina and NAMI.

(b) Voting Rights—I/FMs shall (i) be voting members of Affiliates, (ii) nominate and elect members of the Board of Directors of NAMI North Carolina as provided in Articles IV and V below, and (iii) also be the unit for purposes of determining the number of votes to be allocated to Affiliates in their voting by proportional representation in NAMI North Carolina in any election or other vote, other than the election of the members of the Board of Directors and the amendment of the Bylaws of NAMI North Carolina, as provided in paragraph (2) (c) below.

(c) An I/FM may support and work within several Affiliates but shall be a voting member in only one Affiliate for NAMI North Carolina purposes.

(2) Local Affiliates (“Affiliates”)

(a) Definition—An Affiliate shall be a group of five or more I/FMs which has been granted status as an Affiliate of NAMI by the NAMI Board of Directors.

(b) Affiliation with NAMI North Carolina—By July 1, 1994, all Affiliates within the State of North Carolina shall become members of NAMI North Carolina.

(c) Voting Rights—Each Affiliate in good standing shall be a voting member in any election or other vote on NAMI North Carolina matters, excepting the nomination and election of members of the Board of Directors and amendment of the Bylaws of NAMI North Carolina. The number of votes each Affiliate shall be entitled to cast shall be determined by the following table:

Number of Affiliate Members	Number of Votes
5 - 25	3
26 - 50	4
51 - 75	5
76 - 100	6
+ 1 vote for each additional 25 members	

(d) The number of members in an Affiliate shall be equal to the number of I/FMs paid (or whose dues have been formally waived by that Affiliate) to NAMI North Carolina fourteen (14) days prior to each annual meeting of NAMI North Carolina.

(e) An Affiliate in good standing shall be defined as an Affiliate whose dues have been paid to NAMI North Carolina for the current calendar year and to NAMI at least ninety (90) days prior to the annual meeting of NAMI. A list of I/FMs of the Affiliate shall accompany the dues payment. Dues are not refundable.

(f) NAMI North Carolina Endorsement of Applications for Affiliate Membership in NAMI. All applications from North Carolina for Affiliate membership in NAMI shall be endorsed by NAMI North Carolina. Failure or refusal of NAMI North Carolina to endorse favorably a membership application of a proposed Affiliate within sixty (60) days of the date of NAMI North Carolina’s receipt of a copy of the application from NAMI may, at the election of the Applicant, be deemed to be a dispute resolved through the provisions of Article XIII, below.

Section 3. Non-voting Members (“Associates”).

Non-voting Associate membership is available as defined below.

(a) Members-at-Large. North Carolina residents who live in an area not served by an Affiliate, and non-residents in accord with the purposes of NAMI North Carolina may join as members-at-large by making application to the Membership Committee and by paying the annual dues.

(b) Professional/Organization Membership. This category of Associate membership is applicable to professionals and professional organizations who wish to ally themselves with the stated mission of NAMI North Carolina by payment of an annual contribution in the amount established from time to time for non-voting associate members by resolution of the Board of Directors.

(c) Non-voting members may not hold office.

Article III Finance

Section 1. Dues. Affiliates shall pay dues annually as established by the Board of Directors. Dues shall be submitted to the treasurer of NAMI North Carolina, Inc.

New Affiliates which join NAMI North Carolina after the mid-point of a given dues year, shall be exempt from dues until the beginning of the following dues year.

Section 2. Fiscal Year. The fiscal year shall begin July 1 and end June 30.

Article IV Meetings

Section 1. The annual meeting of the members of NAMI North Carolina shall be held in conjunction with the NAMI North Carolina spring conference each year, unless otherwise directed by the Board of Directors, on such date and at such place as the Board of Directors shall designate. At the annual meeting, vacancies on the Board will be filled in accordance with the procedures set forth in the bylaws. Members representing forty percent (40%) of the voting power of the membership shall constitute a quorum at any meeting of the members. Members shall vote at

the annual meeting as set forth in Article II. Members may be represented by written proxy.

Section 2. Special meetings of the members may be called by the president in concurrence with the majority of the Board of Directors or by a majority of the Board of Directors. Special meetings may also be called by petition of one-eighth of the general membership. A minimum of twenty-one (21) days written notice to Affiliates shall be given for the convening of a special meeting.

Section 3. Resolutions. All resolutions to be acted upon at the annual meeting shall be proposed only by Affiliates, the Board of Directors, duly constituted committees of the annual meeting, or by individual petition. All proposed resolutions shall be submitted in writing to the resolutions committee at least ten (10) days in advance of the annual meeting at which they are to be considered. Resolutions which are submitted to the resolutions committee forty-five (45) or more days prior to the annual meeting shall be forwarded to each Affiliate for deliberation not less than thirty (30) days prior to the annual meeting. Individual petitions must be submitted to the resolutions committee at least forty-five (45) days prior to the annual meeting. In the case of an individual petition, the resolutions committee must vote on the merits of each petition to determine its status as a resolution.

Article V Board of Directors

Section 1. The Board of Directors shall be comprised of twenty (20) members, five (5) of whom shall be officers of the corporation. Board members shall be relatives of mentally ill persons or persons who themselves have experienced a mental illness. These individuals must be members of a NAMI North Carolina affiliate for at least one year. The Board of Directors shall establish the policies of the corporation and shall have the power of the corporation between meetings of the corporation's membership unless otherwise specified in the Articles of Incorporation or these bylaws.

Section 2. Term of Service. The term of office of directors is four years. [This policy began with directors elected in 1993.] Directors may not succeed themselves. A president of the Board of Directors serving the last year of a Director's term will be an ex officio member for one additional year. In the case of a vacancy of one or more members of the Board of Directors, the president shall appoint the person or persons who shall fill the vacancy or vacancies until the next annual meeting.

Section 3. Nominating Procedure for Directors. At least 180 days prior to each annual meeting, the president shall appoint a nominating committee of four, one who is an

incumbent director, but not an officer, and three other members of Affiliates who are not then serving as directors.

Nominations for directors shall be made to the Nominating Committee by members in writing not less than 60 days prior to the Annual Meeting. The recommendations of the Nominating Committee shall be submitted to the general membership at least thirty (30) days prior to the Annual Meeting. In soliciting nominees for the Board of Directors, the nominating committee shall, insofar as possible, provide for representation of the various geographical areas of the state and persons who will serve as strong advocates toward carrying out the purposes and objectives of NAMI North Carolina. Each nomination shall be accompanied by a brief resume of the nominee.

Article VI Delay in Annual Meeting

Section I. In the event that the annual meeting has not taken place as specified in Article IV, Section I, the incumbent officer and directors shall continue to hold office until the annual meeting takes place.

Article VII Directors' Meetings

Section I. Annual Election of Board of Directors' Officers. At least thirty (30) days prior to each annual meeting, the president shall appoint a nominating committee

of three directors who shall present a slate of candidates (who have agreed to serve) at the first Board of Directors meeting after the annual meeting. Nominations from the floor will also be accepted. The elected officers of the corporation shall hold office until the next annual meeting or until their successors shall have been elected.

Section 2. Regular Meetings. In addition to the annual meeting, the Board of Directors shall hold three regular meetings annually, the times and places to be designated by the president.

Section 3. Special Meetings. Special meetings of the Board of Directors may be called by the president or any five members of the Board of Directors with at least fourteen (14) days notice served to each member. Written notice stating the place, day, and hour of the meeting and in the case of special meetings, the purpose or purposes for which the meeting is called, shall be delivered or given, either personally or by mail, to each member or director of record at such address as appears on the books of the corporation not less than fourteen (14) days before the date of the meeting in the case of meetings of members or Board of Directors. Notice given by mailing shall be deemed given at the time such notice is postmarked. Whenever any notice is required to be given, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time stated

therein, shall be deemed equivalent thereto.

Section 4. Quorum. A majority of the Board of Directors shall constitute a quorum at the annual meeting and at any interim meeting; and a majority of those present in either case shall have power to act in all matters, except as specifically provided to the contrary elsewhere in these bylaws and provided, however, that no real estate of the corporation shall be sold, leased, mortgaged, or otherwise disposed of, except by resolution approved by not less than a majority of the Board of Directors.

Section 5. Duties. In addition to the responsibilities vested in them by these bylaws, the directors shall be vested with the responsibility to execute the corporate purposes as stated in the statement of purpose contained in the Articles of Incorporation and the expressed consensus of the members. It shall be the continuing responsibility of the Board of Directors to evaluate the overall function of the organization to ensure that the purposes are being adequately served.

Section 6. Conflicts of Interest. A member of the Board of Directors may be recommended for removal from the Board by the President with prior approval of the Executive Committee for a) activities which are not in the best interest of NAMI North

Carolina, b) activities which are in open conflict with NAMI North Carolina goals as stated in the Bylaws. Any Board member so charged must be notified prior to disclosure to the full Board and given the opportunity to resign without further prejudice. If this option is declined, a majority vote by members would be required at a regular Board meeting and effective immediately.

If a Board member accepts honoraria, fee or payment in any form for an activity resulting from Board membership from a private, not for profit or public entity; the said fee, etc., must be contributed to NAMI North Carolina. If expenses are incurred they may be deducted (travel, etc.) and an itemized accounting with copies of receipts submitted.

Section 7. Attendance. Any board member who has missed three Board meetings within a one year period without valid reason and prior notification may have his position on the Board terminated by a two-thirds vote of the Board of Directors present.

Article VIII Committees

Section 1. Executive Committee. The executive committee shall consist of five officers plus two board members to be selected by majority vote of the Board of Directors. The executive committee shall exercise all powers of the Board of

Directors between meetings of the board. All proceedings of the executive committee shall be reported to the board at its next meeting and shall be subject to revision by a majority vote of the board.

Section 2. Standing Committee. The president shall appoint all standing committees with approval of the executive committee. The standing committees shall include, but not be limited to, the following:

Government Relations &
Continuum of Care
Public Relations & Education
Development
Membership
Bylaws, Resolutions
Budget, Finance & Personnel

Section 3. Ad Hoc Committees and their duties shall be as determined by a majority vote of the executive committee.

Article IX Officers and Duties

Section 1. The officers shall be members of the Board of Directors and shall be: President, Vice-President I, Vice-President II, Treasurer, and Secretary.

Section 2. President. The president shall preside at all meetings of the corporation, the Board of Directors, and the executive committee. The president shall be the chief executive and shall have general supervision of the affairs of the corporation under the direction

of the Board of Directors and the executive committee. The president shall exercise such authority and perform such duties as the Board of Directors may from time to time assign.

Section 3. Vice-President I.

In the event of the death, absence, incapacity, inability or refusal to act of the president, the vice-president shall possess all the powers and perform all the duties of the president, and shall do and perform such other duties and exercise such other authority as may be from time to time imposed upon or assigned to the vice-president by the Board of Directors.

Section 4. Vice-President II.

The second vice-president shall serve in the absence of the first vice-president with the same powers and duties.

Section 5. Secretary. The secretary shall attend all meetings of the Board of Directors and shall record all votes taken and assume responsibility for the taking of minutes of all proceedings. The secretary shall see that notice of meetings is given and shall perform such other duties as are incident to the office of secretary and as may be assigned to the secretary by the Board of Directors or the president. The secretary shall see that all written decisions and directives of the directors are retained.

Section 6. Treasurer. The treasurer shall have supervision of all monies, securities, and other valuable properties of the

corporation and shall cause to be kept full and accurate accounts of the receipts and disbursements of the corporation in books belonging to it. The treasurer shall cause all monies and other valuable effects to be deposited in the name and to the credit of the corporation in such accounts and in such depositories as may be designated by the Board of Directors. The treasurer shall supervise the disbursement of funds of the corporation in accordance with authority of the Board of Directors, taking proper vouchers therefor. The treasurer shall render to the president and directors, whenever required, a written detailed account of his transactions as treasurer and of the financial condition of the corporation, including a statement of all its assets, liabilities, and financial transactions. The treasurer shall further perform such other duties as usually pertain to the office of treasurer. The treasurer may, with the consent of the Board of Directors, assign such duties to the staff of the corporation. The treasurer shall be relieved of all responsibility for any securities or monies or the disbursement thereof committed by the directors to the custody of any other person or corporation, or the supervision of which is delegated by the Board of Directors to any other office, or agent, or employee, or for the performance of the treasurer

delegated by the Board of Directors to any other officer, agent, or employee. The Board of Directors may elect from among its membership or employ an independent agent to audit the corporation's books.

Section 7. Fidelity Bonds.

The treasurer and another person authorized to deposit and withdraw funds shall at the discretion of the Board of Directors be bonded for the faithful performance of the treasurer's duties in such amounts, and by such surety, as the Board of Directors may require.

Section 8. Budget.

The Budget, Finance & Personnel Committee shall prepare an annual budget for the coming fiscal year and a financial report of the past fiscal year for submission to the Board of Directors for approval. Such budget shall be approved by the full Board not less than sixty (60) days prior to the Annual Meeting. The approved budget shall be mailed to the president of each Affiliate at least thirty (30) days before the date of the annual meeting.

Article X Adoption, Revision or Amendment of Bylaws

Section 1. These bylaws shall be submitted to the first annual meeting of the North Carolina Alliance for Mentally Ill and shall take effect after being approved by a majority vote of the delegates present.

Section 2. Revision or Amendment.

Revision or amendments may be proposed by any Affiliate or any director. Any such proposed revision or amendments shall be submitted in writing to the bylaws committee not less than ninety (90) days prior to the date of the next annual meeting. Each member shall receive in writing all proposed revisions or amendments to the bylaws not less than thirty (30) days prior to the next annual meeting of the members. Proposed revisions or amendments shall be presented to the membership at such next annual meeting. A two-thirds majority of the voting power of the membership voting shall be required to revise or amend the bylaws.

Section 3. Interpretation of the Bylaws.

When a question arises regarding the wording of the bylaws, the bylaws committee shall be vested with the authority to interpret the meaning of the bylaws. Interpretations of the bylaws committee shall be reported at the next regular board meeting and will take effect upon approval by a two-thirds vote of the board members present. Interpretations shall be submitted in writing and, upon approval, shall be incorporated into the bylaws in an appropriate fashion, i.e., as an appendix to or gloss of the relevant section.

**Article XI
Not-for-Profit
Corporation Law**

Wherever not otherwise provided in the bylaws, the internal affairs of the corporation shall be governed by the procedures established in the not-for-profit corporation law of the State of North Carolina.

**Article XII
Parliamentary Authority**

A current edition of Robert's Rules of Order shall govern the conduct of business in all applicable cases that are not in conflict with these bylaws.

**Article XIII
Dispute Resolution**

The Board of Directors shall be vested with authority to mediate disputes among and between Affiliates and/or proposed Affiliates, and between NAMI North Carolina and Affiliates/ proposed Affiliates.

**Section 1. Procedure for
Dispute Resolution
Between Affiliates/
Proposed Affiliates.**

The Board shall mediate resolution of any dispute which cannot be successfully resolved by the principals. The President shall receive written notice from the Board of Directors of the Affiliate(s)/proposed Affiliates(s) which are party to the dispute, notifying him of the existence of

the dispute and the names of persons authorized to act on behalf of the disputants. The President shall investigate the dispute and work with the parties to mediate a resolution.

In the event that resolution of the dispute cannot be achieved within ninety (90) days from the receipt by the President of written notice of the existence of the dispute, the dispute, together with the names of persons authorized to act on behalf of the Affiliate/proposed Affiliate, shall be referred to the NAMI Board for final and binding resolution by the NAMI Board.

**Section 2. Procedure for
Dispute Resolution
Between NAMI North
Carolina and Affiliates/
Proposed Affiliates.**

The Board shall mediate resolution of any dispute which cannot be successfully resolved between NAMI North Carolina and Affiliates/proposed Affiliates. The President shall receive written notice from the Board of Directors of the Affiliate(s)/ proposed Affiliate(s) which are party to the dispute, notifying him of the existence of the dispute and the names of persons authorized to act on behalf of the disputants. The President shall investigate the dispute and work with the parties to mediate a resolution.

In the event that resolution of the dispute cannot be achieved within ninety (90) days from the receipt by the President of

written notice of the existence of the dispute, the dispute, together with the names of persons authorized to act on behalf of the Affiliate/proposed Affiliate, shall be referred to the NAMI Board for final and binding resolution by the NAMI Board.

**Article XIV
Use of AMI Name and Logo**

NC AMI shall adopt NAMI-North Carolina as its official name and acknowledges that NAMI controls the use of the name and logo of NAMI and that NAMI North Carolina's uses shall be in accordance with NAMI policy and that upon termination of affiliation with or charter by NAMI, the uses of this name and logo by said organization shall cease.

**Article XV
Nondiscrimination**

NAMI North Carolina and its member Affiliates shall not discriminate against any person or group of persons on the basis of race, disability, creed, gender, religion, age or handicap in the requirements for membership, its policies, or actions.

Bylaws with amendments as approved April 4, 1998

Sample Affiliate Bylaws



I. Mission

To provide support, education and advocacy for persons with mental illness and their families.

To promote better quality of care, rights and interests of citizens with mental illness, particularly of those who cannot speak for themselves, and to advocate policies at the local, state and national levels to accomplish these objectives.

To help families and friends of persons with mental illness by providing emotional support, education and information.

II. Membership

A. Membership is comprised of persons with mental illness and their families and friends. Mental health care professionals are also welcome as members.

B. Members in good standing are eligible to hold office and vote in person or by proxy on all motions considered at general membership meetings.

C. Control of this organization rests with the members. Any action of the Board of Directors is subject to review and approval by a majority of the membership. Any member may request that any action or motion be tabled or rescinded by a majority of the membership at a special meeting called for the purpose.

III. Dues

A. Individual/Family members pay \$25 dues yearly as established by the Board of Directors.

B. Open Door members pay annual dues of \$3 or whatever amount they can afford.

IV. Membership Meetings

A. Regular meetings of the membership will be held once a month except in July and December.

B. The March membership meeting is designated as the Annual Meeting for the election of officers.

C. Officers will be inducted at the April meeting.

D. Special meetings of the members may be called by the President, the Board of Directors or on request of five or more members.

V. Fiscal Year

The fiscal year begins January 1 and ends December 31.

VI. Board of Directors

A. The Board of Directors will have no more than nine members including the five elected officers—president, first vice-president, second vice-president, treasurer and secretary. The officers may elect by majority vote as many as four additional directors from among the affiliate members to serve concurrent terms.

VII. Terms of Office

A. The officers' regular term of office is one year, continuing until the election of their successors.

B. The immediate past president serves as an ex-officio member of the Board of Directors.

C. The Board of Directors may replace any director or officer who has failed to attend three consecutive board meetings. After giving reasonable notice to the director or officer involved, board may declare the office vacant.

D. The board will elect replacements to fill vacant elective positions except for the office of president.

VIII. Duties of Officers

A. The president presides at all

meetings of the members and of the Board of Directors. The president appoints chairmen for all committees except the Nominating Committee, with the approval of the Board, and supervises their work. The President acts as the affiliate's executive officer and, in general, performs the duties usually associated with the office of president.

B. The first vice president succeeds the president in case of a vacancy in that office and performs the duties of the president in his absence or disability. The first vice president undertakes other responsibilities assigned by the president.

C. The second vice president succeeds the first vice president in case of a vacancy in that office and shall perform the duties of the first vice president in his absence or disability. The second vice president undertakes other responsibilities assigned by the president.

D. The secretary handles correspondence for the affiliate and records minutes of all meetings of the membership and the Executive Board.

E. The treasurer receives and disburses all the affiliate's funds and maintains a complete and accurate account of all funds received and disbursed. The treasurer provides members an annual financial report listing all

receipts and disbursements by budget category after the close of the fiscal year.

IX. Authorization to Spend Affiliate Funds

A. The treasurer is authorized to pay as much as \$50 in a given month for any valid office expenses for supplies, printing or postage. All other disbursements of funds must be approved in advance by either the Board of Directors or the membership.

B. The Board of Directors, by approval of at least three of its members, may authorize expenditures of as much as \$200 in one month for any expenses deemed appropriate to the mission of the affiliate. The board will use discretion in authorizing expenditures and will seek membership approval when possible.

C. Expenditures not approved by the Board of Directors or in excess of \$200 must be approved by a majority vote of members in good standing at a regular membership meeting.

X. Elections

A. Officers are nominated by a three-member Nominating Committee appointed by the president and including at least one member who is a past president of the affiliate.

B. After securing the consent of the nominees to serve if elected,

the Nominating Committee prepares a slate of candidates for election as officers.

C. Officer nominations are permitted from the floor, provided the candidate is a member in good standing and has agreed to serve if elected.

D. Nominees are the relatives of persons with mental illness or mental health care consumers.

XI. Standing Committees

A. The Executive Board creates suitable standing committees as needed.

B. The Board of Directors may create special committees as needed.

XII. Parliamentary Authority

A current edition of *Robert's Rules of Order* shall govern the conduct of business in all cases in which they are applicable and not in conflict with the bylaws.

XIII. Amendments

Any proposed amendment to the affiliate bylaws is to be presented in writing to the entire general membership at least three weeks before the meeting at which it is to be voted on. Ratification of the amendment requires a favorable vote by at least two-thirds of the members in good standing present at the meeting.

NAMI North Carolina thanks Bob Andersen and Bob Best whose presentation to the 1989 Fall Conference, "Organizing & Strengthening an Affiliate," provided information for this section.

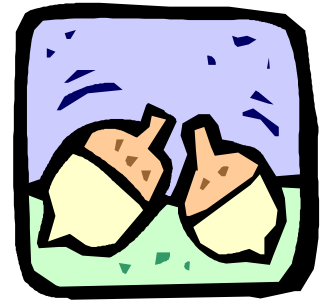
The first step in organizing a new affiliate involves contacting family members in your area and inviting them to attend an organizational meeting. You can contact prospective affiliate members by—

- Placing ads in local newspapers.
- Asking your county mental health center to mail your prepared letter to their confidential mailing list.
- Contacting local mental health care practitioners and telling them how an affiliate can help their clients or patients and their families.

At your first organizational meeting, let participants know they are not alone and that together, you can make a difference.

- Consider having the first meeting in a founding member's home.
- Invite a staff member from NAMI North Carolina or a member from an established affiliate to discuss affiliate programs and benefits and answer questions.
- Keep the first meeting relatively unstructured.

Organizing a New Affiliate



- Have people introduce themselves and briefly explain their interest in forming an affiliate.
 - Discuss problems meeting attendees have experienced in getting the services they need and brainstorm ways to improve access.
 - Circulate a sign-up sheet on which participants note their name, address and telephone number. This list serves as your membership roster. Pass the hat to cover any meeting expenses.
 - Before adjourning, appoint volunteers to handle officers' duties temporarily, until the group can nominate and vote on a slate of officers. Essential tasks include chairing the next few meetings, recording meeting minutes and collecting dues.
 - Immediately after the meeting, mail a letter or newsletter to members, welcoming them to the new affiliate and outlining next steps. Enclose a copy of the membership roster.
 - As soon as possible, find a suitable permanent meeting location, perhaps at a church or public meeting facility.
 - Determine a mutually convenient day of the week and time of day for meetings and stick to them.
 - Schedule both a beginning and an ending time for meetings.
- The primary purposes of any NAMI affiliate are to offer support, education and advocacy. At first, however, the members of your new affiliate will face a number of preliminary tasks.
- Develop a slate of officers, making sure the member is willing and able to serve before making the nomination.
 - Have your newly elected officers identify a member willing and able to serve as the local telephone contact for your affiliate.
 - Arrange for ongoing communication with members by appointing a willing volunteer to mail meeting notices or a simple newsletter as needed.
 - Establish a telephone calling plan to enable your affiliate to

communicate timely news and information as quickly as possible.

- Members should work together to develop a mission statement for the affiliate to be published in your newsletter and brochures and posted where you meet. Keeping your mission statement highly visible helps members understand the affiliate's purpose and goals.
- Based on the affiliate's goals and priorities, the officers should establish committees to take on specific tasks as needed.
- Using the sample bylaws as a guide, your members should develop bylaws for your affiliate.
- Follow the established custom of using "NAMI" followed by your city, county or region when naming your new affiliate.
- Once you have chosen a name, contact the state office to have a custom-designed logo created.
- Follow the state guidelines in establishing membership categories and setting dues.

With essential tasks completed, your members should reach a consensus on how much time they want to devote to support and how much to education, advocacy and affiliate business. Be sure and plan events for

socializing, too. Schedule meetings and plan programs and activities accordingly.

- Foster a sense of ownership in the affiliate by offering all members opportunities for continuing involvement.
- Use the newsletter as a means of recognizing members for their contributions to the affiliate.
- Your affiliate's initial priority should be supporting members and enabling them to help themselves.
- Support sessions should offer a safe, understanding and caring environment in which to express feelings.
- Group participants can respond to a member in need or in crisis by sharing their own similar experiences and suggesting possible alternatives.
- Participants should avoid giving direct advice or therapy.
- While support group sessions should help those most in need, all group members should have an opportunity to participate.
- Focus primarily on the affiliate member rather than the family member who is ill.
- Don't be afraid to use humor when appropriate.
- Be especially sensitive to new members and help them feel comfortable.

- As the support group grows, consider dividing into smaller groups and meeting separately, either in separate rooms or at separate times.

- As soon as possible, arrange for one or more of your members to be trained as a Family-to-Family Support group facilitator. The state office staff provides the training for free. By having trained facilitators guide your support meetings, you vastly improve the quality and effectiveness of the support your members receive.

If your affiliate is to flourish, you must retain your charter members and create a steady supply of new members. NAMI's Family-to-Family Education course is the best source of new members who are prepared to assume leadership roles in your affiliate.

- As soon as possible, have at least two of your members trained to teach the Family-to-Family Education course, and encourage your charter members to enroll in the first session.

By having members trained to offer both Family-to-Family Support and Education, your affiliate will greatly improve the quality of its services its chances for healthy growth and long-lasting success.

Contact Matisha Brown, Family-to-Family Coordinator at NAMI North Carolina, for more information.

NAMI North Carolina's mission is to support, educate and advocate. This manual focuses on advocacy, although any effective advocacy requires a great deal of education and support of legislators and community leaders.

NAMI North Carolina advocates for the comprehensive, appropriate treatment of the mentally ill and the needs of their families. How and whether that level of treatment and support occurs is a function of the state budget, rules, and laws effecting mental health. As family members and friends of those with mental illness, we either can allow others to make these decisions or we can participate in the process of making and forming the laws, rules, and budgets themselves.

We would like to offer our thanks to the NAMI North Carolina Legislative Committee. We gratefully acknowledge these sources—

- The North Carolina Psychological Association *Legislative Handbook*
- The Coalition 2001 *Handbook*
- The League of Women Voters' "Tips for Effective Lobbying"
- The SEANC/ EMPAC *Legislative Action Guide*

The General Assembly at a Glance

The North Carolina General Assembly, also referred to as the Legislature, sets policy and makes laws. It also adopts the State Budget and largely controls how

funds are allocated. The Governor has veto power, but rarely uses it.

The General Assembly is composed of two chambers—the Senate and the House of Representatives—each of which has its own elected leaders and committee structure.

The North Carolina General Assembly consists of 50 members in the Senate elected from 72 districts and 120 members elected from 55 districts in the House of Representatives.

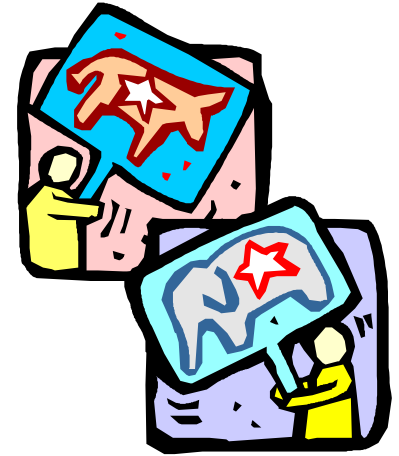
Each legislator is elected for a two-year term which begins in January of each odd-numbered year.

The General Assembly is required to meet for a long legislative session in odd numbered years. The long session typically lasts from January to July.

In even numbered years, the General Assembly meets for a short session from May to July, primarily to adjust the budget passed during the long session.

Legislative Manual

Advocating for Persons with Mental Illness



When in session, the Senate and House generally meet Monday evenings, early afternoons Tuesday through Thursday and Friday mornings. Committees generally meet in the mornings and late afternoons.

The Senate

The Lieutenant Governor serves as President of the Senate and is elected by the people in a statewide election to serve a four-year term. A President *Pro Tempore* is elected by and from the Senate membership to serve in the absence of the Lieutenant Governor. Senate committees are appointed by the President *Pro Tempore*. The Lieutenant Governor has no voting privilege except to break a tie.

The House of Representatives

The Speaker of the House of Representatives is elected by and from the membership of the House. A Speaker *Pro Tempore* is elected to serve in the Speaker's absence. House committees are appointed by the Speaker of the House.

The Funding Process

Development of the budget for the state is a two-year process. It begins at least eight months prior to the convening of a General Assembly session when the Departments within government are asked to develop their budget recommendations. Here is an outline of the process with the approximate timeline:

Spring—Governor gives the Departments budget guidelines for developing the biennial budget.

Spring and Summer—Departments (e.g., the Department of Health and Human Resources) request priorities from the Divisions (e.g., the Division of Mental Health) to develop budget priorities. The Divisions, in turn, request priorities from local programs.

Fall—Departments develop their priorities and submit them to the Governor.

The Governor develops his budget.

January—The General Assembly convenes and the Governor presents the budget package. The package is referred to the Appropriations Committees in the House and Senate.

Winter and Early Spring—The House and Senate Appropriations Committees break into subcommittees by topic to review the base

How a Bill Becomes Law



1. Pre-filing of bill with the principal clerk of the House or Senate by a member
2. Introduction of a bill by a member or receipt of a bill from the House or Senate

Note: A legislator who introduces a bill is referred to as the bill's sponsor.

3. First reading (by title only)
4. Referral to Committee by Speaker of the House or President *Pro Tempore* of the Senate

5. Committee consideration and report

Note: Once in committee, a bill may be amended or referred to additional committees and/or subcommittees. This is a crucial step in the legislative process because an unfavorable committee report can halt the progress or "kill" a bill.

6. Placed on House or Senate Calendar

7. Second reading (debate)

8. Third reading (debate)

Note: Both the House and Senate must approve the bill (repeating the process in the second chamber) before it can be passed into law. If a bill passes in a different form in the second chamber and there is no concurrence by the first chamber, the bill must be referred to Conference Committee in an attempt to make the bill acceptable to both the House and Senate.

9. Joint House and Senate Conference Committee Consideration (when necessary)
10. Enrollment (printing the legislation in its final form)
11. To Secretary of State for inclusion in Official Records and Printing

(current) budget, plus the requests for increases (expansion budget). The House Speaker and Senate President *Pro-Tempore* appoint these committees which may meet jointly.

Late Spring—The appropriation sub-committees make recommendations to the full appropriations committee, and deliberations begin on a final budget proposal.

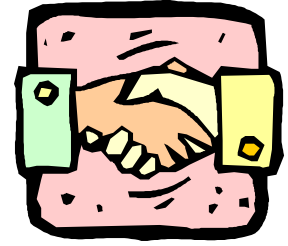
Any bills introduced which request funds in addition to the proposed budget are called special bills and are referred to the appropriations committee.

At the close of the session the final appropriations bill will be reported out of committee to the full House and Senate for approval. After appropriations bill approval, the special bills which are being recommended for funding will be reported out and acted upon by the full House and Senate.

The General Assembly will return to Raleigh for a short budget session, usually in May in even numbered years, to review the second year of its appropriations and make adjustments (e.g., adding raises for state employees).

If a bill is introduced which carries both policy changes and funding it must go through the general bill process as far as a committee giving it a favorable report. Then it becomes part of the appropriations process as a special bill.

Tips for Effective Legislative Interaction



Develop personal relationships. Legislators value the information and opinions they receive from constituents. Do not underestimate this. Begin to develop a personal relationship so that when NAMI North Carolina or your affiliate needs you, you can act quickly.

Be brief. Legislators receive information on many hundreds of subjects. Be brief and concise.

Be timely. Contact your legislators early. Even if they can't commit on your issue, they will know that it will be coming up and can contact you. Once they do commit, it is very hard for them to change and still maintain credibility.

Be honest and don't bluff. If you don't know the answer to a question, say so. Then research the question and get the answer to the legislator promptly. If you conceal important facts or give legislators bad information, your case is dead.

Be clear. As generalists, legislators and staff are not up on the jargon of the mental health system. Don't use acronyms that only some of us understand. At the same time, don't be condescending or talk down to them. Be concise and straightforward.

Explain how the general public will benefit. Legislators know the majority of individuals who come to them have a personal interest in the legislation they are supporting. Besides explaining how the legislation affects your family or friends, explain how it will benefit the general public. For example, you may talk about how legislation to help your family member will also benefit our state and our society by reducing the costs of mental illness.

Avoid becoming defensive or angry. The majority of legislators are trying to do a good job under pressure. So give legislators the benefit of the doubt and do not become defensive or angry if a legislator disagrees with your position. Be polite and straightforward. Remember, in politics, today's opponent can be tomorrow's ally—unless you have made a permanent enemy.

Contacting Legislators

Telephone calls. Try to talk with the legislator directly. Most do not mind receiving calls at home, but only at reasonable hours. If you encounter a staff person, communicate the same information to him or her, but tactfully request a return call from the legislator.

Written communication. Address the letter properly. Confine your message to a single page. Do not use form letters. Ask for a response.

Face-to-face meetings. Set up the contact at a convenient time. Breakfast is a good time because legislators may be more available. Take a fellow member with you for support, but let the legislator know in advance. Explain NAMI's goals, and be brief.

Follow-up. Follow up your contact with a thank you letter, whether or not the legislator supported your bill and whether not it passed.

Feedback. Share correspondence with NAMI North Carolina or your affiliate and send a note detailing the contact and the result.

Member to Member Behind the Scenes at the North Carolina General Assembly



by Beth Melcher, Ph.D., Executive Director
NAMI North Carolina

Despite public cynicism, I always am amazed at our system of government and the fact that it actually works.

In the legislature, elected individuals from all walks of life and persuasions debate the needs, issues and concerns of our citizens. It is a microcosm of who we are and provides a forum to seek, above all, compromise and agreement on issues that could divide us. It is not a pretty process as it lurches along, but for the most part, it works. I don't share the public cynicism. The reality is that any constituency can influence the political process, provided constituents—

- Are organized
- Are articulate
- Present workable solutions instead of merely identifying problems
- Have cultivated a broad base of support

If we haven't been as successful as we'd like in the legislature advocating for the issues that concern us, then we must get better at presenting our concerns.

The best example of successful advocacy is our recent fight for insurance parity, which overcame what initially seemed like insurmountable odds. How did we succeed?

- We had strong leadership through the sponsor of the bill and those leading the coalition of groups supporting parity.
- We did our homework, got our facts right, and took a great deal of time educating legislators and the media.
- The grassroots responded. Constituents contacted legislators and joined us in sending a clear message that this is an important issue to the folks back home.
- Confident of the public support, legislators were able to reject pressure by lobbyists representing the insurance industry.

I believe the success with parity is an experience we can repeat to address funding and service needs.

Advocacy works.

For information, contact Beth Melcher at 919 788-0801.

Incorporate your affiliate by filing the form titled, "Articles of Incorporation, Nonprofit Corporation" with the office of North Carolina's Secretary of State.

To request a copy of the form, call the Secretary of State's office at 919 733-4201 or toll-free at 888 246-7636. They will mail you the form. You can also download and print the form from the Secretary of State's World Wide Web site at <http://www.state.nc.us/secstate>.

The form asks for basic information, including—

- The official name of your affiliate
- The street address and county of the corporation's initial registered office (e.g., your president's home address)
- The affiliate's mailing address
- The name of your initial registered agent (e.g., your president)
- The name and address of each incorporator (e.g., other officers)

The form instructs you to attach provisions regarding the distribution of the corporation's assets, should you dissolve the corporation later, along with any other provisions you want to include.

The fee for filing articles of incorporation for a nonprofit organization in North Carolina is \$60.

Incorporating Your Affiliate



Form SS-4

Once your affiliate is incorporated, apply to the IRS for an employer identification number (EIN) using Form SS-4.

You will need an EIN to apply for non-profit tax status.

To order an SS-4 form from the IRS, call 800 829-3676. It will take 7 to 15 working days for you to receive the forms in the mail. You may download forms from the IRS World Wide Web site at http://www.irs.ustreas.gov/prod/forms_pubs/forms.html.

Changing Your Affiliate's Name or Address

Once your affiliate is incorporated, you are responsible for keeping the Secretary of State's office informed of any changes of name or address for the affiliate.

Use the form titled "Articles of Amendment, Nonprofit Corporation" to notify the Secretary of State of a name change for your affiliate.

Use the "Nonprofit Corporation Statement of Change of Principal Office" to register a change of address.

After you have formally registered the new affiliate name with the state, you must then file a name change form with the IRS.

Notify the state office, your bank and the post office of the name change, too.

Filing for Tax-Exempt Status



Form 8718

Titled "User Fee for Exempt Organization Determination Letter Request," this one-page form must accompany your Form 1023 when you file for tax-exempt status with the IRS.

The form's purpose is to determine the user fee amount to enclose with your application for tax-exempt status, based on your affiliate's gross receipts.

If your affiliate's annual gross receipts average less than \$10,000 during the past four years, the fee is \$150.

If your gross annual receipts during the past four year average more than \$10,000, the fee is \$500.

Attach a check or money order for the appropriate amount to the form.

Form 1023

Use the "Application for Recognition of Exemption Under Section 501 (c) (3) of the Internal Revenue Code" form to apply for official non-profit status.

Although the form is nine pages long, you can complete the applicable portions for a newly-organized affiliate fairly quickly.

If your affiliate has been in operation for a number of years, you will have to provide income and expense records for the past three years, so allow extra

time to secure the appropriate financial reports from your treasurer.

Step-by-step instructions for completing Form 1023 begin on the following page. The recommended responses are appropriate for most affiliates, but we strongly encourage you to review IRS instructions, too, to make sure our suggestions apply to your affiliate.

Your responses to Part IV of Form 1023 will depend on how long your affiliate has been incorporated, so be sure to read Part IV carefully to determine the right responses for your affiliate.

The IRS will contact you if you have not filled out the forms completely. They will make sure you have applied properly.

Form 990 or 990EZ

Once you have filed Form 1023, your affiliate will be on probation for three years. File yearly tax returns for your incorporated affiliate during those three years, no matter what your income, using Form 990 or 990-EZ.

Determination Letter

During the probation period, your affiliate remains a tax-exempt organization, but your tax status is not official until you receive official notification from the IRS.

After the three-year probation period, provided you have successfully satisfied IRS requirements for non-profit status, the IRS will issue an Exempt Organization Determination Letter.

Once you have received the determination letter, you will be required to file income tax returns for the affiliate only for years in which your gross receipts total more than \$5,000.

Please review the "Organizing for Success" section of the Affiliate Tool Kit for a summary of restrictions applying to 501 (c) (3) corporations.

Step-by-Step Guidelines for Completing Form 1023

Page 1 of Form 1023 asks for basic information, including the affiliate's Employer Identification Number (EIN), assigned by the IRS when you submit Form SS-4.

Part I Guidelines

- In 1b, which asks for "c/o Name," list either the affiliate president or treasurer.
- For line 5, the date incorporated or formed, list the date when the Secretary of State approved your articles of incorporation.
- Leave the boxes in line six unchecked.
- Indicate your affiliate is a corporation in line 10, and attach a copy of your Articles of Incorporation approved by the Secretary of State.
- Attach a copy of your affiliate's bylaws.
- Have the officer you listed in 1b sign the form.

Part II Guidelines

- Use the example from NAMI Wake County to guide you in preparing a description of your affiliate's activities.
- For line 2, if yours is a typical affiliate, most of your financial support is from members' dues, with some additional support for projects from NAMI North Carolina and/or local organizations. If you

How NAMI Wake County Described its Activities



1. Support group to help families and mental health consumers handle the difficulties of living with severe and persistent mental illness in the family and to learn how to get better services for individuals who have mental illness. Started May 1997, three hours per month, 20 percent of group's activities. Conducted by volunteer members on the second and fourth Monday nights of each month at Highland Methodist Church, 1901 Ridge Road, Raleigh, NC 27612.

2. Educational meetings to inform members of services in the community, updates in treatments and medications for persons with mental illness. Started May 1997, three hours per month, 20 percent of activities. Conducted by the president on the fourth Monday night of each month at Highland Methodist Church.

3. Monthly luncheon and pot luck dinners twice a year to provide fellowship for members and social activities for persons with mental illnesses. Started May 1997, three hours per month, 20 percent of activities for the group. Organized by various members, with events held at restaurants, parks and members' homes.

4. Board meetings to plan educational meetings and other activities. Started May 1997, three hours per month, 20 percent of group's activities. Conducted by the president on the second Thursday of each month at officers' homes.

5. Distribution of brochures, public speaking presentations to service organizations and displays at health fairs, etc., to inform the public of the need for better services and treatments for the mentally ill. Started May 1997, 1.5 hours per month, ten percent of group's activities. Conducted by members throughout the community.

6. Letter writing to legislators and mental health professionals to encourage better services and treatments for those who have mental illness. Started May 1997, occurs periodically, as issues emerge, five percent of group's activities. Carried out by members as needed.

7. Representation on Area Mental Health and Clients Rights Committee to speak for mental health clients' treatment in the mental health system. Started June 1997, one hour per month, five percent of activities. Conducted by members.

anticipate a grant that would substantially increase your funds, attach a statement and description of that grant.

- If your affiliate conducts or plans to conduct fund raising activities, such as organizing special events or seeking donations or grants, describe them in line 3. If not, mark "N/A."
- Leave line 4b blank.
- Check "No" boxes for lines 4c, 4d, 5, 6, 7, 9 and 10a and b.
- Unless your affiliate owns a computer or other significant assets, indicate "N/A" for line 8.
- For line 11, check the "Yes" box and complete sections a, b and c.
- Check the "N/A" boxes for 12a and b.
- If your affiliate responds to Legislative Alerts from the state office by writing letters and/or calling legislators, check "Yes" on line 13. Estimate the percentage of time members are involved in this activity, and be sure to state your affiliate uses no funds for this purpose.
- Check "No" in line 14. We are not allowed to promote or campaign against candidates for political office.

Part III Guidelines

If your affiliate was incorporated within the last 15 months:

- Check "Yes" in line 1.
- Leave lines 2 through 7 blank.
- Check "No" in line 8.
- Leave lines 9 through 14 blank.
- Check all "No" boxes in line 15.

If your affiliate has been incorporated for more than 15 months and has not had receipts of more than \$5,000 per year during that time:

- Check "No" in line 1.
- Check box b in line 2.
- Leave lines 3 through 7 blank.
- Check "No" in line 8.
- Leave lines 9 through 14 blank.
- Check all "No" boxes in line 15.

If your affiliate has been incorporated for more than 15 months and you have received more than \$5,000 in any year, we suggest you consult with a lawyer.

Part IV Guidelines

Part IV asks for a statement of your affiliate's revenues and expenses and for a balance sheet.

- If you have operated your affiliate as a corporation for at least one year, fill in the financial information for the current year.
- If you have operated your affiliate as a corporation for more than one year, fill in the financial information for the current year and for up to three previous years of operation as a corporation.
- If you have operated your affiliate as a corporation for less than one year, provide figures for the current year and proposed budgets for the next two years.
- Your entries in the assets portion of the balance sheet will most likely consist of your checking account balance.

- Most affiliates have no liabilities to list.

Taxes

- Your affiliate must file corporate income tax returns annually.
- You must collect state sales tax on any products you sell.
- Once your tax-exempt status becomes official, you may apply to the North Carolina Department of Revenue for exemption from state sales tax. You still pay the tax, but may apply for refunds semi-annually.

For information, call the North Carolina Department of Revenue at 919 733-7983.

Charitable Solicitation License

If you plan to raise \$25,000 or more, you must secure a Charitable Solicitation License from the North Carolina Department of Human Resources. For more information, call 919 733-4510.

Need Forms or Help?

To order IRS application forms, call 800 829-3676 and ask for Forms 1023, 8718 and SS-4. It will take 7 to 15 working days for you to receive the forms in the mail. You may download forms from the IRS World Wide Web site at http://www.irs.ustreas.gov/prod/forms_pubs/forms.html.

Contact Membership Coordinator Beth Greb in the state office if you have questions about tax-exempt status.

Publishing Your Affiliate Newsletter



As newsletter editor, you are responsible for—

- Tracking other publications for new and information of interest to members
- Planning story lists for each issue
- Writing and/or editing stories
- Developing and maintaining a graphic design format
- Establishing and maintaining a regular publication schedule
- Printing, addressing and mailing the newsletter

You may find yourself completing all tasks yourself, or you may make your newsletter a collaborative effort.

Your members depend on your newsletter to keep track of meeting dates, affiliate programs and activities, news of other members and local events and issues. They also depend on the newsletter to help them interpret news and understand how issues affect them.

As an advocacy group, your affiliate has a definite viewpoint, and your newsletter stories should reflect that. You're not trying to present stories objectively. You're trying to represent the *under-represented* viewpoints and interests of people with mental illness and their families. You are writing specifically and solely for them.

Newsletter Goals

You can help your affiliate achieve its larger support, education and advocacy goals by

setting supporting goals for your publication and planning content accordingly. Your goals might include—

- Keeping members informed about upcoming affiliate meetings and events.
- Reporting on the local aspects or impact of state and national news stories of interest to members.
- Recognizing and expressing appreciation for member contributions to affiliate projects.
- Encouraging members to use a full range of affiliate services.
- Providing information readers can use to follow up on stories, such as telephone numbers and addresses, magazine and journal article citations, book titles and publication information, etc.
- Promoting programs, such as Family-to-Family, Young Families and Leadership Academy, and encouraging members to seek the training they need to participate.
- Promoting a sense of ownership and belonging in the affiliate for all members.
- Keeping members informed about pending legislation and opportunities for advocacy.

- Informing prospective members, mental health care professionals and other targeted audiences about the affiliate and encouraging them to join.

Story Lists

Plan newsletter contents based on the goals.

First, sketch out plans for a year's worth of lead stories. Some stories will fall naturally into a particular issue. For example, you'll want to publish a report of an affiliate fund-raising event in the next issue after the event. The timing for other stories can be more flexible. For example, you can publish stories on general interest topics—medical research, treatments, services—any time.

Why plan ahead?

- You're more likely to achieve a balanced mix of stories over time.
- You can scan other publications for the topics you plan to cover and file clippings or photocopies as you find them. When you're ready to

write the story, much of your research will already be done.

- It's easier to work with other contributors to the newsletter if you can assign stories well in advance of the publication date.
- You'll minimize last-minute scrambling to meet your publication deadline.

As a general rule, include only information not readily available in other publications.

Remember, your purpose is to support the affiliate's goals and serve as a resource for the members of your affiliate—not to duplicate the efforts of scientific journals and magazines.

Certainly, if you find a book or article that would interest your readers, summarize it in the newsletter and direct those who want more information to the source. Don't waste your affiliate's resources reprinting materials your readers could easily find in another publication.

Make your newsletter complement NAMI North Carolina's "Clippings" and NAMI's "Advocate" by focusing on news of your affiliate and local angles of state and national stories.

While the content will vary from issue to issue, the *types* of information you publish will be fairly consistent from issue to issue. By establishing standard "departments" that carry over from issue to issue, you can simplify the planning process for each issue and help your readers

find the information they're looking for quickly and easily.

Possible departments you may wish to include in every issue—

- A President's letter
- Business meeting minutes
- A calendar listing upcoming affiliate support, educational and business meetings and their programs and/or agendas
- Treatment update
- Legislative update
- Current news about your Area Mental Health Authority and other resources and services in your community

Provide readers the information they need to take action after reading a story. If you suggest they write a legislator, provide the address. If you review a new book, give readers the information they need to order it or find it at the bookstore.

Writing & Editing

As editor of your affiliate's newsletter, you plan each issue's content. You will probably serve as chief reporter and copywriter as well.

Ideally, a number of members will contribute newsletter content.

- Your secretary will supply business meeting minutes. Committee heads can provide monthly reports of their activities.

- Your president can write a monthly column about affiliate programs and activities.
- Other members may write articles about personal experiences.
- A local agency staff member may be willing to write an article or column specifically for your members.
- Other local professionals, such as therapists, doctors, lawyers and law enforcement officers can write articles of interest to your readers.

As editor, you assign stories, set deadlines and keep each issue on track.

You also edit.

Since your contributors are volunteers, you may feel reluctant to make changes in their copy. Still, you should at least check spelling and grammar and use consistent abbreviations, capitalization and other style variables. For example, most newspapers follow the *Associated Press Stylebook* custom of referring to people by their surname after the first reference. *The Wall Street Journal* uses a different style, referring to people using a title (Mr., Ms., Dr., etc.) with the surname.

The particulars of the style you follow for your newsletter are not so important as consistency. If you abbreviate days of the week in one article, abbreviate them in all articles. If you capitalize job titles in one story, capitalize them in all stories.

You may edit copy to make it more readable or more easily understandable. You may edit a story to make it fit—ideally by making a number of small cuts throughout the piece, rather than simply dropping the final paragraphs.

You may also add notes, such as contact information, additional resources on the topic or suggested actions the readers can take.

finally, check the language used. Replace any references to “mentally ill people” or “the mentally ill” with “people with (“or suffering from” or “coping with”) mental illness.”

Graphic Design

A fundamental rule of design states, “Form follows function.” Another important design principle: “Less is more.”

The function of graphic design is to help you communicate most effectively. The form your newsletter takes should support the newsletter’s communications goals as simply and directly as possible.

There’s seldom any functional purpose served by fussy borders, decorative clip art or computer-rendered type effects. You’re trying to inform, educate and motivate your readers—not demonstrate the features of your design software to them.

Your design should look and be easy to read.

- A series of short paragraphs is easier to read than a solid block of text.
- A familiar typeface is easier to read than an unfamiliar one, so choose a simple, standard type for story text. Use novelty faces sparingly, if at all.
- Roman or upright type is easier to read than italic type, which tends to slow the reader down. That’s why it’s good to use italics for emphasis, but not for long passages of text.
- Words written in all-capital letters are the most difficult to read because readers recognize words by their shape—not by their individual letters. Words in all caps have essentially the same rectangular outline.
- Type set in columns is easier to read than type set the full width of the page.
- As a general rule, a line of type should be no longer than one and one-half times the width of the alphabet set in that type at that size.
- The longer the line of type, the more space you should put between each line. The standard is to space lines at 120 percent the size of the type. Usually, this is the default or automatic setting on word processing, graphic design and desktop publishing software.

You can design your newsletter to fit on single 8.5 by 11- or 14-inch sheets, printed front and

back, with multiple pages stapled at the corner.

You may also design for printing on 11 by 17-inch paper, folded to 8.5 by 11 and then in half or thirds for mailing.

Make your graphic design consistent from issue to issue. If possible, place regular columns at the same location in each issue.

Contact the state office for free help with designing a logo for your newsletter.

Printing

For most affiliates, photocopying is the most cost-efficient printing method. Use a high-resolution laser printer and smooth paper to make a sharp master copy.

If you use an ink jet printer to create your master copy, use premium-grade paper made especially for ink jet printers. The paper’s coating will keep the ink from soaking into the paper, resulting in sharper lines and edges.

Circulation

Your mailing list should include—

- All current members by household
- One or more state office staff members
- Local reporters and editors who cover mental health issues

- Editors of newsletters for other affiliates (who send you copies of their newsletters, too)
- Area Mental Health Authority contacts
- Any social worker, psychiatrist or psychologist who has expressed interest in your affiliate
- Opinion leaders, such as ministers, hospital discharge planners, editors and reporters
- Teachers, school counselors and school psychologists
- Other organizations with compatible missions, such as the local branches of the Mental Health Association, the Depressive/Manic Depressive Association, Legal Aid or organizations for mental health care consumers

You should maintain a separate list of prospective members and establish a time limit of three to six months for their free subscriptions. Otherwise, your mailing list and your printing and postage expenses will keep growing at the expense of your dues-paying members.

Certainly, use the newsletter to give prospective members a sample of your member benefits. Just remember the purpose of a sample is to make the prospect buy the product—or, in your case—join the affiliate.

The most likely prospective members include—

- Family-to-Family Education course participants
- Family-to-Family Support group visitors
- Callers to your local contact number