

Affiliate Operations and Compliance

Mental Health America offers affiliates vital assistance on operational issues such as board development, fundraising plans and program implementation. Affiliates also have access to a collection of resources. Affiliates pay annual dues for access to these resources and discounts on publications and event registration fees.

Mental Health America Standards for Affiliates

Standards Defined

Standards indicate what is required by all affiliates, regardless of their model of affiliation. If an affiliate does not meet a particular Standard, this would generate a discussion as to why and may have implications on its affiliation status. Through training, technical assistance and peer supports, Mental Health America will work with MHA affiliates to help each meet the needed requirements to comply with MHA standards.

Leadership

- Work to achieve the MHA mission and vision of a just, humane and healthy society
- Establish and maintain a visible, positive image for the affiliate and ensure significant influence, so the general public will recognize it as a leading mental health and substance abuse organization
- Include consumers, family members and mental health and substance abuse providers in the staffing, leadership and/or operation of the affiliate
- Maximize the involvement of volunteers, who represent the diversity of the community and mental health and substance abuse fields, in the work of the affiliate
- Provide input, feedback and perspective within the MHA network to help shape the direction and development of the MHA movement

Affiliate Relations

- Execute an affiliation agreement expressing compliance with national standards and policies and maintain affiliate status by completing re-affiliation paperwork, fulfilling dues obligations, and participating in a self-evaluation process
- Participate in affiliate-to-affiliate communication throughout the MHA network

Advocacy/Public Policy

- Advocate for public policies in keeping with the MHA mission through leadership, partnerships, and/or participation in coalitions

Research/Services

Establish or promote evidence-based, best, or promising practices to help put research into practice within the community

Education

Plan and implement public education and media efforts in partnership with the other parts of the MHA network, and ensure that all materials are consistent with the messages and principles of the MHA movement

Cultural Competence

- Engage staff and board in the development, endorsement and implementation of a statement, guiding principles, and action plan related to cultural and linguistic competence
- Work to create a staff, board and programs that represent and respond to the diversity of the community

Marketing Identification

Use a name, logo and mission statement consistent with the national organization to help create a unified brand for the MHA movement

Administration/Organizational Maintenance

- If appropriate, incorporate and seek IRS approval as a 501(c)(3) tax-exempt organization, maintain awareness of the limitations 501(c)(3) organizations have regarding lobbying, and when necessary, take the appropriate steps to protect tax-exempt status
- Provide annual administrative and financial reporting on a timely basis as required by law and affiliation agreements
- Maintain required documentation for internal and external reporting
- Comply with all federal, state and local laws and regulations, Generally Accepted Accounting Principles, and other standards or requirements of appropriate oversight authorities
- Develop and implement effective and realistic strategies for financial management and operation

Probationary and Policy Affiliates

- Affiliates in the first three years after affiliation, or that have been placed on probation, are referred to as "probationary affiliates." All Standards shall be applied to probationary affiliates with due recognition of the difficulties incurred in launching a new organization or rebuilding one. In response to specific conditions, MHA may modify application of the Standards to accommodate a probationary affiliate's circumstances.

- State affiliates that engage principally in state policy advocacy, education, and public information and local affiliates that do not have the resources to engage staff or operate programs and limit their activities to policy advocacy, education, and public information are referred to as "policy affiliates." Policy affiliates shall be held to all Standards except for the programmatic requirements of Standard 4, relating to Research/Services, the application of which may be modified by MHA to accommodate the policy affiliate's circumstances.

Re-affiliation

Once an organization becomes an affiliate, it participates in a periodic re-affiliation process to ensure its continued adherence to the standards of affiliation.

Re-affiliation requires a self-evaluation on the part of affiliates every one, three or five years (although this may be different depending upon the last re-affiliation), providing an opportunity for the affiliate, in collaboration with the National Office, to determine if standards are being maintained, whether goals and objectives are being met, and where special recognition or supportive assistance may be needed.

Self-evaluations are then peer reviewed by members of the Affiliate Relations Committee and MHA board members with the intention of providing:

- helpful information to the MHA National Office;
- constructive feedback to affiliates on their activities, issues and programs;
- support and recommendations; and
- recognition of good work.

An underlying premise of the process is the importance of affiliates being evaluated by their colleagues who both recognize their potential as well as the issues involved in managing a successful Mental Health America Affiliate.

Steps in the Peer Review Process

1. Each chartering or direct MHA affiliate completes a brief self-evaluation, based upon the MHA's Standards for Affiliates, to be completed and returned to the National Office within 30 days of receipt.
2. A peer reviewer reviews the self-evaluation, comparing it to previous self-evaluation information as appropriate, and arranges for a conference call with the affiliate to clarify any questions.
3. The peer reviewer presents the recommendations to the Affiliate Relations Committee for approval. Once approved, the Board of Directors will vote on whether to approve the re-affiliation.
4. Recommendations/comments will be communicated in writing to the affiliate by the MHA President and CEO.