

## Protocols for Affiliate WHM /WHMB / BASICS Class Stipends

Using the With Hope in Mind and NAMI BASICS<sup>1</sup> Technical Manuals as our reference, a class is defined as a minimum of 8 appropriate<sup>2</sup>, participating students.<sup>3</sup>

### Payment Schedule:

8+ Students	\$500.00
7 Students	\$437.50
6 Students	\$375.00
5 Students	\$312.50
4 Students	\$250.00
3 Students	\$187.50

### Payment Process:

This process will not require any additional work by volunteers or affiliate leaders. Class teachers are asked to send required paperwork to the NAMI TN office, Attn: Education Department. During the course of each class, education volunteers will check to make sure the following paperwork has been submitted:

- Name and contact information of all persons entering the class as a student.
- Pre-Needs Assessments (Preloaded in the student manual Workshop 1)
- Post-Needs Assessments / Student Evaluations (Preloaded in the student manual Workshop 8)
- Class Rolls
- Graduation List
- Teacher Evaluations (One from each teacher)
- Final Class Report
- Childcare Paperwork (if applicable)
  - Includes Childcare Attendance Sheet
  - Consent and Release for EVERY child
  - Reimbursement Requests for Childcare Providers

Teachers should copy all class paperwork before mailing it in. The paperwork will be reviewed for completeness and a reimbursement request will be sent to accounting. If the affiliate is a 501 (c)(3), payment will be made in the form of a check. If the affiliate is not a 501 (c)(3), the money will be moved into their affiliate on-going funds account. *Please allow 4 weeks for funds to be available.*

<sup>1</sup>At this time, payment will be based on all appropriate persons entering the class as participants rather than the number of people graduating.

<sup>2</sup>“Appropriate” students are class participants who meet the student criteria as listed in the technical manual of the individual program and participate as students in the class.

Those who do not qualify as “appropriate, participating students” are persons who:

- Do not meet the criteria to be involved in the class (consumers, professionals, and others who enter the class without wearing their “family hat” first and foremost)
- Have taken the class before or are trained to teach/facilitate the program they are taking. (Previous participants and trained teachers/facilitators are always welcome to take the class again but only count as “appropriate, participating students” toward class payment one time. This measure focuses on educating our communities and avoids the appearance of “stacking” the class for the purpose of increasing funding.)
- Guest Speakers
- Professionals filling the role of Resource Person for the class

<sup>3</sup> The NAMI Basics Technical Manual currently defines a class as a minimum of fourteen (14) students. Dr. Brister informed me on 11/13 that the number will be lowered to eight (8) (The current national average for a Basics class) in the Summer 09 update and has encouraged us to go ahead and adopt that number as the official definition of a class

## PROCESS

### **How it All Works in The Office (These are the instructions education volunteers receive to complete the process.)**

Education volunteers will set up notebooks to file paperwork from each class. A blank copy of the checklist will be the front page of each class.

- Data from all persons recorded in prescreening tools or class rolls will be entered in the Helpline Database. Record pertinent data they supply as to contact information, consumer/family information, illness information, etc. In the Resolution portion make sure to record information about the class they are enrolling in. (Class type, class number, teachers, affiliate, etc.)

At the end of the class, if any required information is missing:

- Class teachers will be contacted and an attempt will be made to get any information needed to complete the checklist.

If (when) all information has been received, Education Volunteers will:

- Complete the Affiliate Reimbursement Form by filling in:
  - the date
  - the name of the affiliate that is getting the payment (if two or more affiliates are splitting the class money, complete a separate Affiliate Reimbursement Form for each affiliate)
  - The *Name Required on the Check* blank should always be the affiliate name, never an individual.
  - The Mailing Address should be the mailing address used by the affiliate
  - You DO NOT need to complete the Funds to come from portion of the form. This will be completed by accounting.
  - Complete the amount to reimburse using the formula listed above. In the case of multiple affiliates, confirm in writing (email) how they have decided to split the funds.
  - In the Notes section, please record the class identification number, the total number of students participating in the class, and the class end date.
  - Sign as the requestor
  - Leave the Approved by line blank
- Copy the completed checklist form and attach it with a paperclip behind the Affiliate Reimbursement Form.
- Make an additional copy (one copy for accounting, one copy for education records)
- Roger will sign both copies and turn the original in to Susan for payment. The Education copy will be placed in the class paperwork completing the class.