

# FY2020 VOLUNTEER HANDBOOK



Family and Connection Support Group Training - June 2018

## Our Mission

*NAMI Vermont supports, educates and advocates so that all communities, families, and individuals affected by mental illness or mental health challenges can build better lives.*



# Contact Information

## NAMI VERMONT STATE OFFICE

**Address:** 600 Blair Park Road, Suite 301  
Williston, VT 05495  
**Phone:** (802) 876-7949  
**Toll Free:** (800) 639-6480  
**Website:** [www.namivt.org](http://www.namivt.org)  
**E-mail:** [info@namivt.org](mailto:info@namivt.org)

**Executive Director:** Laurie Emerson  
(802) 876-7949 x 101  
[lemerson@namivt.org](mailto:lemerson@namivt.org)

**Program Director:** Nick Martin  
(802) 876-7949 x 102  
[nickmartin@namivt.org](mailto:nickmartin@namivt.org)

**Development Director:** Amy Perry  
(802) 876-7949 x 103  
[aperry@namivt.org](mailto:aperry@namivt.org)

**Office Manager:** Margie Lemay  
(802) 876-7949 x 100  
[mlemay@namivt.org](mailto:mlemay@namivt.org)

**Board Chair:** Phil Blackburn  
(713) 591-2857  
[blackburnphil@gmail.com](mailto:blackburnphil@gmail.com)

## NAMI NATIONAL OFFICE

**Address:** 3803 North Fairfax Drive, Suite 100  
Arlington VA 22203  
**Phone:** (703) 524-7600  
**Toll Free:** (800) 950-6264  
**Fax:** (703) 524-9094  
**Website:** [www.nami.org](http://www.nami.org)

# Table of Contents:

- Introduction - About NAMI Vermont p. 3
- About NAMI National p. 4
- About Volunteering & Affiliates p. 5-7
- Volunteer Descriptions for Programs p. 13-26
- Appendices
  - Appendix I:
    - Programs & Services p. 27
  - Appendix II: Volunteer Forms
    - Confidentiality Agreement p. 30
    - Volunteer Opportunity Descriptions p. 31
    - Emergency Contact Information p. 32-33
  - Appendix III:
    - NAMI Vermont Purchasing Policy p. 34-35
    - Purchase Order Form p. 36
  - Appendix IV:
    - Language p. 37-38
  - Appendix V:
    - Complaints & Grievance Policy/Form p. 39

# Introduction

## **Welcome to NAMI Vermont!**

We are excited you have decided to be a part of our team working to improve the lives of the individuals we serve. Volunteers are a very important part of the success of NAMI Vermont and we are so grateful to you for giving your time and energy. This handbook will help ensure that your experiences will be positive ones.

**Our Mission:** NAMI Vermont supports, educates and advocates so that all communities, families, and individuals affected by mental illness or mental health challenges can build better lives.

**Our Vision:** A world where Vermonters affected by mental illness or mental health challenges have the care, support and knowledge that they need.

**Background:** The National Alliance on Mental Illness of Vermont, Inc. (NAMI Vermont) is a statewide volunteer organization comprised of family members, friends, and individuals living with a mental illness. We have the lived experience and have joined together in membership to help ourselves and others by providing support, information, education and advocacy.

NAMI Vermont is dedicated to raising awareness and providing essential education, advocacy and support group programs for people living with mental illness, their loved ones, and communities throughout Vermont. NAMI Vermont is a non-profit, 501(c)(3) grassroots organization.

## **Our Values:**

- **Empathy:** We share common experiences that develop understanding, empathy, and compassion for one another.
- **Acceptance:** We practice non-judgmental, unbiased acceptance.
- **Hope:** We maintain hope that through treatment and support people can and do recover.
- **Resilience:** We believe in the resilience and capacity of individuals to recover and maintain wellness.
- **Honesty:** We believe honesty builds self-awareness and open-mindedness.
- **Self-Care:** We encourage self-care as a means to cope with challenges and maintain well-being.
- **Empowerment:** We support individuals and families rebuilding their lives; we promote personal responsibility and self-advocacy; and we provide education and training that empowers individuals to develop their potential.
- **Inclusion:** We value and respect the contributions of each person toward a better understanding of the diversity of needs and capacity among us, and we affirm the importance of those contributions toward empowerment, resiliency, and recovery.

**Who We Serve:** We serve community members in Vermont such as families, persons living with a mental health condition, professionals and any community member who wants to learn more and be involved. We do this through education, support and advocacy.

# About NAMI National

**Mission:** NAMI provides advocacy, education, support and public awareness so that all individuals and families affected by mental illness can build better lives.

**Vision:** NAMI envisions a world where all persons affected by mental illness experience resiliency, recovery and wellness.

NAMI, the National Alliance on Mental Illness, is the nation's largest grassroots mental health organization dedicated to building better lives for the millions of Americans affected by mental illness.

What started as a small group of families gathered around a kitchen table in 1979 has blossomed into the nation's leading voice on mental health. Today, we are an association of hundreds of local affiliates, state organizations and volunteers who work in your community to raise awareness and provide support and education that was not previously available to those in need. NAMI relies on gifts and contributions to support our important work.

## What We Do

**We educate.** Offered in thousands of communities across America through our NAMI State Organizations and NAMI Affiliates, our education programs ensure hundreds of thousands of families, individuals and educators get the support and information they need.

**We advocate.** NAMI shapes the national public policy landscape for people with mental illness and their families and provides grassroots volunteer leaders with the tools, resources and skills necessary to save mental health in all states.

**We listen.** Our toll-free NAMI HelpLine allows us to respond personally to hundreds of thousands of requests each year, providing free referral, information and support—a much-needed lifeline for many.

**We lead.** Public awareness events and activities, including Mental Illness Awareness Week (MIAW), NAMIWalks and other efforts, successfully combat stigma and encourage understanding. NAMI works with reporters on a daily basis to make sure our country understands how important mental health is.

# Volunteering for NAMI Vermont

## Initial Involvement

All new volunteers will be provided with the “NAMI Vermont Volunteer Handbook”. Volunteers are encouraged to read this handbook and are required to fill out the following paperwork for the office:

- Volunteer interest form
- Confidentiality policy
- Emergency Contact form

## Orientation and Training

This handbook serves as a general introduction about NAMI Vermont. Trainings are provided free of charge to prepare volunteers for specific jobs, such as support group facilitators and class or workshop teachers.

We offer refresher training to help support and update volunteers on new approaches and new information. We are committed to the fidelity of NAMI Vermont Programs.

## Supervision

Every volunteer will be supported by members of the staff. We offer verbal and written feedback in order to be more effective and continuously improve.

## Record Management

Volunteer hours and positions are tracked to provide accurate data for our reporting systems and meeting goals. NAMI Vermont collects data on our programs for reporting on progress so that we can continuously improve our programs.

## Reimbursement of Expenses

NAMI Vermont will reimburse pre-approved expenses and provide mileage reimbursement in accordance with NAMI Vermont policies. See appendix III for the full purchasing policy and a copy of the Purchase Order and Check Requisition form. You may make copies of this form. For more detail, please reference the NAMI Vermont policies.

## Emergency Closings

At times, emergencies such as severe weather can disrupt NAMI Vermont office operations and other programs. In extreme cases, circumstances may require closing the office or canceling a program. Volunteers acting as teachers and facilitators will use their own judgement for safety in inclement weather and must notify the office when such cancellation takes place. The office updates the website calendar any time there is a closing or cancellation.

# Who Are NAMI Vermont Volunteers?

*Volunteers and employees are partners in implementing the mission of the organization with complementary roles. All NAMI programs are supported by volunteer efforts. Volunteers have always been essential to the success of NAMI's operations.*

## Equal Opportunity Policy

NAMI Vermont strongly maintains an equal opportunity policy. We recruit, accept, train, promote, and dismiss volunteers on the basis of competence and job performance, without regard to race, creed, color, religion, gender, sexual orientation, age, marital status, or disability.

## Volunteer Philosophy

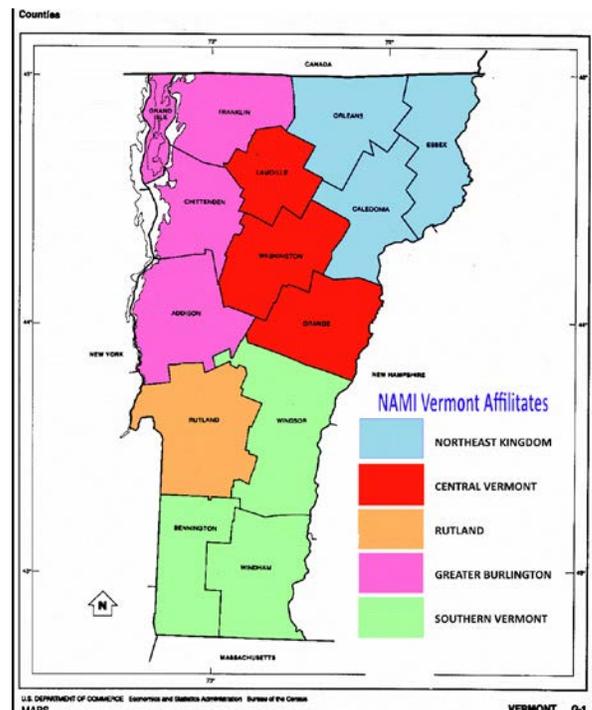
NAMI Vermont values volunteers as absolutely essential to NAMI Vermont's existence and ongoing vitality. NAMI Vermont aims to give volunteers meaningful responsibilities and recognition for work done; and volunteers are expected to actively perform their duties to the best of their abilities, while remaining loyal to the mission of NAMI Vermont.

# Where Are NAMI Vermont Volunteers?

NAMI Vermont volunteers are located throughout Vermont within the affiliate network . They provide support, education, outreach and hope to the members of their community affected by mental health conditions.

NAMI Vermont is geographically comprised of five current Affiliates:

- Central Vermont
  - Lamoille, Orange & Washington Counties
- Greater Burlington Area
  - Addison, Chittenden, Franklin & Grand Isle Counties
- Northeast Kingdom
  - Caledonia, Essex & Orleans Counties
- Rutland
  - Rutland County
- Southern Vermont
  - Bennington, Windsor & Windham Counties



# Guidelines for Volunteering for NAMI Vermont

## **Standards of Ethical Conduct**

All volunteers should conduct their work in a manner consistent with the NAMI Vermont mission, values and policies. In general, volunteers are expected to practice good judgment, based on ethical principles that will guide acceptable conduct.

All volunteers should disclose relevant conflicts of interest to their staff contact when introduced to NAMI Vermont, and as potential conflicts of interest arise. Board members who have decision-making authority must disclose all potential and known conflicts of interest.

Volunteer service with NAMI Vermont is at the mutual consent of the volunteer and NAMI Vermont. Either party may terminate that relationship at any time, with or without cause, and with or without advance notice.

We hope your volunteer service will be a rewarding and fulfilling experience that will benefit not only our community but our volunteers as well.

If an ethical question arises, then please contact the NAMI Vermont office.

## **Confidentiality**

All volunteers will be required to read, sign and comply with the NAMI Vermont Confidentiality Agreement. This form can be found in Appendix 1.

## **Media Conduct and Interaction with Outside Organizations/Individuals**

Volunteers should never represent themselves as spokespersons of NAMI Vermont or represent NAMI Vermont's official stance on issues. Only the Board President and the Executive Director or their designee shall serve as a spokesperson for NAMI Vermont.

## **Safety and Legal Liability**

The organization does its best to assure the safety of our NAMI Vermont volunteers. Volunteers need to pay particular attention to safety instructions and proper use of equipment. Volunteers should voice any safety concerns and report any injuries to the NAMI Vermont office.

NAMI Vermont maintains the right to conduct background checks on volunteers.

NAMI Vermont maintains general liability insurance to protect staff and volunteers while they serve the organization. Coverage is provided when volunteers are performing the work of NAMI Vermont.

When a volunteer drives his/her own vehicle or another vehicle not owned, leased, or rented by NAMI Vermont, NAMI Vermont liability and physical damage insurance does not apply. Volunteers should have their own automobile liability insurance.

NAMI Vermont's Board of Directors and NAMI Vermont volunteers are covered by NAMI Vermont's Director's and Officer's liability insurance that covers errors and omissions which does not include automobile liability.

# Volunteer Descriptions

NAMI Vermont volunteers serve in the following capacities:

- Clerical and secretarial office workers
- Outreach volunteers at community fairs, festivals and other community events
- Trainers, peer education course teachers and peer support group facilitators
- Guest speakers at classes and other venues
- Board Members who govern the organization by setting policy and directing committees
- Members of committees (standing and ad hoc), i.e.:
  - Executive Committee - Made up of Board officers: President, First Vice President, Second Vice President, Secretary and Treasurer
  - Finance Committee - Board Committee to review financial reports, contracts, and recommend financial policy to the Board
  - Governance Committee - Board Committee to recommend changes to Policy and Bylaws.
  - Grants Committee - researches, identifies and assists in the submission of grant applications.
  - Nominating Committee—recruits and nominates new board members.
  - Advocacy Committee – updates Advocacy Priorities, serves on statewide committees and advocates in the community for an improved system of care.
  - Events Committee - plans the Annual Conference and NAMI Vermont MINDwalk.
  - Peer Leadership Council - alerts the Board on issues relevant to persons living with mental health conditions.
- Plus much, much more!

All NAMI Vermont volunteers are encouraged to become members of NAMI Vermont.

For Program Leaders, refresher training after 5 years is provided to remain current in programming updates. Updated training opportunities are available, usually on an annual basis. Trainings are provided at no cost to you!

Volunteers will receive annual reminders of Roles & Responsibilities.

NAMI Vermont volunteers provide critical services and tasks that are necessary to the success of the organization. Serving on a variety of Committees is one option:

## Role of a Committee:

Committees are tasked with the job to suggest policy, make recommendations, facilitate planning and guide the NAMI Vermont Board of Directors through a variety of issues. Committees research issues and options for the Board and are valuable entities for NAMI Vermont. Decisions by committees are brought to the Board of Directors for approval unless board approval is not required. The staff and Board are most appreciative of the time and effort to guide the Board and its operations.

Volunteers will be provided updated committee descriptions as changes are made.

## **Current Committees:**

*Updated 1/18/2016 by Governance Committee. Updated 2/29/2016 by Governance Committee.*

### ***Standing Committees***

- Executive Committee  
*(eligibility to serve on the Executive Committee is limited to officers of the Board)*
- Finance Committee
- Governance Committee

### ***Board and Ad Hoc Committees / Work Groups***

- Advocacy Committee
- Nominating Committee
- Events Committee
- Grants Committee
- Annual Business Meeting Planning

### ***Advisory Committees***

- Peer Leadership Council

### **Joining a Committee:**

All committee members must be approved by the Board. All NAMI Vermont members are eligible to serve on NAMI Vermont committees except for the Executive Committee which is limited to officers of the Board.

1. Interested participants are encouraged to attend two committee meetings prior to joining the committee as a voting member. Board members can be approved as a voting member on a committee without meeting the requirement to attend two meetings first.
2. The Committee Chair or NAMI Vermont staff will discuss the role of the committee, time commitment, and skills of the individual to determine if they meet the requirements. Any relevant documents pertaining to the committee such as past minutes and the committee charter will be shared.
3. The Committee Chair will provide information to the Board President or Executive Director about any new committee members that they would like approved by the Board.
4. Once the Board has decided regarding the application of a member to join a committee, a NAMI Vermont Board Member or staff member will notify the Committee Chair and the new member.

**Expectations of Committee Members:**

1. Be a NAMI Vermont Member.
2. Attend meetings in person or by conference call.
3. Vote at meetings when motions are presented.
4. Notify the chair or office about their absence from a meeting.
  - a. Two unexcused absences could serve as a basis to revoke voting privileges.
5. Actively participate in and between meetings (in person, by phone, email, etc.)
6. Respect the diverse ideas and opinions of other members.

**NAMI Vermont and/or the Chairperson will:**

1. Give notice of the place, date, and hour at which a committee meeting is to be held no less than two (2) days prior to the meeting.
2. Provide access to information, materials, and past minutes of the committee upon request.

**Quorum:**

1. A majority of the committee shall constitute a quorum.
2. A majority of those present shall have power to act on all matters before the committee.

**Committee Meeting Documents:**

NAMI Vermont uses Office 365/Microsoft One Drive to store and share documents with committee members. These files include the agenda, minutes, and any work documents provided at the meeting. Any volunteer who needs training to use One Drive, should notify the office to schedule training.

# Program Volunteers/Leaders - Teachers, Facilitators, and Trainers

For details of each program see Appendix I

## Family-to-Family Teacher

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Family-to-Family Teacher</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● Co-teach the 8-week Family-to-Family Course</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize the class and recruit/interview participants</li> <li>● Help to promote the class by posting flyers in the community, networking with other agencies, schools, and postings in community event calendars and newsletters</li> <li>● Participate in planning and debrief conference calls as needed</li> <li>● Conduct 8-week Family-to-Family course</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Planning and preparation 2 months prior to course</li> <li>● 2.5 hours, 1 evening a week for 8 weeks plus any necessary prep time during the course</li> <li>● Minimum: 2 classes – No Maximum</li> <li>● Annual refresher as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Any family member or partner of an individual living with a mental health condition may apply to become a Family-to-Family teacher</li> <li>● Must go through an interview and screening process to determine whether the opportunity is a good fit</li> <li>● Must be certified by NAMI Vermont after completing training</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● Free training, mileage reimbursement, meals, and lodging as needed</li> <li>● Updated teacher manual and other materials/resources</li> <li>● Close working relationship with Program Director</li> </ul>

## Family-to-Family Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Family-to-Family Teacher Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To train all Family-to-Family teachers in the NAMI National model</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize the training and recruit/interview applicants</li> <li>● Conduct statewide teacher training and refresher training</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Weekend certification training by NAMI National (out of state)</li> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● Conduct three-day weekend training and/or refresher/recertification (as needed)</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified Family-to-Family Teacher</li> <li>● Must be certified by NAMI National</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● National training, transportation, lodging and meals</li> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# Family Support Group Program

## Family Support Group Facilitator

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Family Support Group Facilitator</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● Facilitate Family Support Groups for family members, partners &amp; close friends of individuals living with a mental health condition</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with Program Director to identify meeting space, dates, times</li> <li>● Responsible for respectful use of space including securing building post-meeting</li> <li>● Organize local outreach efforts:             <ul style="list-style-type: none"> <li>○ Posting flyers and community calendar listings</li> <li>○ Participating in community outreach events, etc.</li> </ul> </li> <li>● Facilitate Support Group meetings to include the distribution of NAMI Vermont materials and information</li> <li>● Track and post program data on website or send data to Program Director</li> <li>● Participate in facilitator conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Minimum: 2 years – No Maximum</li> <li>● Free Training (including meals and lodging when applicable)</li> <li>● Limited time devoted to outreach with affiliates</li> <li>● Monthly (or twice per month) 90-minute Family Support Group meetings plus any necessary preparation time</li> <li>● Refresher or recertification training as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be a family member of an individual living with a mental health condition</li> <li>● Must go through an interview and screening process to determine whether the opportunity is a good fit</li> <li>● Must be certified by NAMI Vermont after completing training</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● Free training, mileage reimbursement, meals, and lodging as needed</li> <li>● Updated facilitator manual and other materials/resources</li> <li>● Close working relationship with Program Director</li> </ul>

## Family Support Group Facilitator Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Family Support Group Facilitator Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To train all Family Support Group facilitators in the NAMI National model</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize the training and recruit/interview applicants</li> <li>● Conduct facilitator training and/or refresher/recertification as needed</li> <li>● Participate in planning and debrief conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Intensive weekend certification training by NAMI National</li> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● Conduct weekend training and/or refresher/recertification (as needed)</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified Family Support Group Facilitator</li> <li>● Must be certified by NAMI National</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● National training, transportation, lodging and meals</li> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# NAMI Connection Recovery Support Group Program

## NAMI Connection Recovery Support Group Facilitator

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● NAMI Connection Recovery Support Group Facilitator</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To co-facilitate NAMI Connection Support Groups for individuals living with a mental health condition</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with Program Director to identify meeting space, dates, times</li> <li>● Responsible for respectful use of space including securing building post meeting</li> <li>● Organize local outreach efforts:             <ul style="list-style-type: none"> <li>○ Posting flyers &amp; community calendar listings</li> <li>○ Participating in community outreach events, etc.</li> </ul> </li> <li>● Facilitate Support Group meetings to include the distribution of NAMI Vermont materials and information</li> <li>● Track and post program data on website or send data to Program Director</li> <li>● Participate in facilitator conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Intensive facilitator training</li> <li>● Limited time devoted to outreach with affiliates</li> <li>● Weekly, bi-weekly, or monthly 90-minute Connection Support Group meetings plus any necessary preparation time</li> <li>● Minimum one-year commitment</li> <li>● Refresher or recertification training as needed</li> <li>● Minimum: 1 year - Maximum: No limit</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Any adult living in recovery with a mental health condition that expresses an interest may apply</li> <li>● Must go through an interview and screening process to determine whether the opportunity is a good fit</li> <li>● Must be certified by NAMI Vermont after completing training</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● Groups may have more than two facilitators who share responsibilities</li> <li>● Free training, mileage reimbursement, meals, and lodging as needed</li> <li>● Updated facilitator manual and other materials</li> <li>● Close working relationship with Program Director</li> </ul>

## NAMI Connection Recovery Support Group Facilitator Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● NAMI Connection Recovery Support Group Facilitator Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● Train support group facilitators in the NAMI National model</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize facilitator training</li> <li>● Work with the Program Director to recruit and/or interview applicants</li> <li>● Conduct <del>two-day</del> facilitator training and/or <del>one-day</del> refresher as needed</li> <li>● Participate in planning and debrief conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Intensive weekend certification training by NAMI National</li> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● Conduct <del>two-day</del> weekend training and/or <del>one-day</del> refresher/recertification (as needed)</li> <li>● 5-year appointment: No limit on maximum</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified Connection Recovery Support Group Facilitator</li> <li>● Must be certified by NAMI National</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● National training, transportation, lodging and meals</li> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# Mental Illness and Recovery Workshop

## Mental Illness and Recovery Workshop Teacher

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Mental Illness and Recovery Workshop Teacher</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To teach the 1-day workshop</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize the class</li> <li>● Conduct the 1-day workshop</li> <li>● Participate in planning and debrief conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● 1 day workshop plus any necessary prep time</li> <li>● Scheduling based on availability of teachers and participants</li> <li>● Refresher/recertification (as needed)</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be certified after completing statewide training</li> <li>● Must be a member of NAMI Vermont and familiar with our programs</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● Free training, meals, and mileage reimbursement</li> <li>● Audio/visual equipment supplied by NAMI Vermont</li> <li>● Reimbursement of approved expenses and mileage</li> <li>● Updated teacher manual</li> <li>● Materials for promoting the workshop</li> <li>● Close working relationship with Program Director</li> </ul>

## Mental Illness and Recovery Workshop Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Mental Illness and Recovery Workshop Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To train all Mental Illness and Recovery teachers</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize the statewide teacher training and recruit/interview applicants</li> <li>● Conduct statewide training / refresher</li> <li>● Work with NAMI Vermont to update the curriculum as needed</li> <li>● Participate in planning and debrief conference calls as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● The workshop trainer will be responsible for conducting the 1-day intensive training / refresher</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified Mental Illness and Recovery workshop teacher</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# Provider Program

## Provider Teacher

<b>Job Title</b>	<ul style="list-style-type: none"><li>● Provider Teacher</li></ul>
<b>Purpose</b>	<ul style="list-style-type: none"><li>● Teach 15-hour Provider Course or 4-hour seminar (when requested)</li></ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"><li>● Work with the Program Director to organize the class</li><li>● Conduct 15-hour Provider course or 4-hour seminar</li><li>● Participate in planning and debrief conference calls as needed</li></ul>
<b>Supervision</b>	<ul style="list-style-type: none"><li>● NAMI Vermont Program Director</li></ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"><li>● 15-hours (or 4-hour seminar) plus any necessary prep time during the course (this may include a planning meeting)</li><li>● Refresher or recertification training (as needed)</li></ul>
<b>Qualifications</b>	<ul style="list-style-type: none"><li>● Must be a family member, individual with a mental health condition or a provider who is also either a family member or an individual with a mental health condition</li><li>● Must be certified after completing statewide training</li><li>● Must be a member of NAMI Vermont</li></ul>
<b>Support Provided</b>	<ul style="list-style-type: none"><li>● Free training, mileage reimbursement, meals, and lodging as needed</li><li>● Updated teacher manual and other materials/resources</li><li>● Close working relationship with Program Director</li></ul>

## Provider Teacher Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● Provider Teacher Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To train all Provider teachers in the NAMI (National) model</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize training and recruit/ interview applicants</li> <li>● Participate in planning and debrief conference calls as needed</li> <li>● Conduct training and refresher/recertification as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Weekend certification training by NAMI (National) out of state</li> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● Conduct training and refresher as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified Provider teacher</li> <li>● Must be certified by NAMI (National)</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● National training, transportation, lodging and meals</li> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# In Our Own Voice Presentation

## In Our Own Voice Presenter

<b>Job Title</b>	<ul style="list-style-type: none"> <li>• In Our Own Voice Presenter</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>• Give presentations to the public</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>• Work with the Program Director and IOOV Coordinator to schedule presentation(s)</li> <li>• Send in paperwork to Program Director</li> <li>• Participate in planning and conference calls as needed</li> <li>• Give presentations in the community</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>• NAMI Vermont Program Director</li> <li>• NAMI Vermont In Our Own Voice Coordinator</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>• Planning and preparation prior to presentation</li> <li>• Refresher or recertification – as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>• Any individual living in recovery who has or had a mental health condition</li> <li>• Comfortable speaking in front of people to share your story</li> <li>• Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>• Free online, self-paced training <i>and</i> a one-day in-person training (including lodging and meals when applicable)</li> <li>• Updated manual and other materials/resources</li> <li>• Close working relationship with Program Director and Coordinator</li> <li>• Reimbursements for approved expenses, including mileage</li> </ul>

## In Our Own Voice Trainer

<b>Job Title</b>	<ul style="list-style-type: none"> <li>● In Our Own Voice Trainer</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>● To train all In Our Own Voice presenters in the NAMI National model</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>● Work with the Program Director to organize training and recruit/interview applicants</li> <li>● Conduct presenter training and refresher as needed</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>● NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>● Intensive weekend certification training by NAMI National</li> <li>● Planning and recruitment 6 weeks prior to training</li> <li>● Conduct training and refresher as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>● Must be an experienced certified In Our Own Voice Presenter</li> <li>● Must be certified by NAMI (National)</li> <li>● Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>● National training, transportation, lodging and meals</li> <li>● Updated trainer manual and other materials/resources</li> <li>● Reimbursement of approved expenses, mileage, and stipend</li> <li>● Close working relationship with Program Director</li> </ul>

# Ending the Silence Presentation

## Ending the Silence Presenter

Note to presenter(s): this program requires the Affiliate to be approved by NAMI (National) to provide this presentation.

<b>Job Title</b>	<ul style="list-style-type: none"> <li>Ending the Silence Presenter</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>Give presentations to students, faculty, and parents</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>Work with the Program Director to schedule presentation(s)</li> <li>Send in paperwork to Program Director</li> <li>Participate in planning and conference calls as needed</li> <li>Give presentations in the schools</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>Planning and preparation prior to presentation</li> <li>Refresher or recertification – as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>Primary Presenter: An individual with a mental health condition or a family member of a person in recovery;</li> <li>Presenter Two: An individual living in recovery who has or had a mental health condition within ages 18-35</li> <li>Comfortable speaking in front of people to share your story</li> <li>Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>Online self-paced training, mock presentation upon completing training</li> <li>Updated resources and/or presentation supplies</li> <li>Close working relationship with Program Director</li> <li>Reimbursements for approved expenses, including mileage</li> </ul>

## Ending the Silence Coordinator

<b>Job Title</b>	<ul style="list-style-type: none"> <li>Ending the Silence Coordinator</li> </ul>
<b>Purpose</b>	<ul style="list-style-type: none"> <li>To coordinate all Ending the Silence presentations with NAMI Vermont</li> </ul>
<b>Key Responsibilities</b>	<ul style="list-style-type: none"> <li>Work with the Program Director to recruit/interview applicants</li> <li>Communicate with presenters and coordinate presentations</li> <li>Offer guidance during/after “mock” presentation</li> </ul>
<b>Supervision</b>	<ul style="list-style-type: none"> <li>NAMI Vermont Program Director</li> </ul>
<b>Time Commitment</b>	<ul style="list-style-type: none"> <li>Planning with presenters and Program Director</li> <li>Recommend refresher training as needed</li> </ul>
<b>Qualifications</b>	<ul style="list-style-type: none"> <li>Must be a trained presenter in Ending the Silence</li> <li>Must be a member of NAMI Vermont</li> </ul>
<b>Support Provided</b>	<ul style="list-style-type: none"> <li>Materials/resources necessary for presentations</li> <li>Reimbursement of approved expenses, mileage, and stipend</li> <li>Close working relationship with Program Director</li> </ul>

# APPENDICES

## Appendix I: Fact Sheets



## PROGRAMS & SERVICES

### Education Programs

#### **Family-to-Family:**

Family-to-Family is a free evidence-based 8-week course for families, partners and friends of individuals with serious mental illness, taught by trained NAMI Family members. The course focuses on families' emotional responses to the trauma of mental illness; many family members describe their experience in the program as "life changing." Scientific evaluation demonstrates that course participants gain a greater understanding of mental illness, cope better with the strains of illness, worry less, and feel greatly empowered to navigate the health care and political systems to get better treatment and services.

This course includes:

- Current information about schizophrenia, major depression, bipolar disorder (manic depression), panic disorder, obsessive-compulsive disorder, borderline personality disorder, post traumatic disorder (PTSD), co-occurring brain disorders and addictive disorders
- Information about medications, side effects, and other treatments
- Current research related to the biology of brain disorders and the evidence-based, most effective treatments to promote recovery
- Gaining empathy by understanding the subjective, lived experience of a person with mental illness
- Learning in special workshops for problem solving, listening, and communication techniques
- Acquiring strategies for handling crises and relapse
- Focusing on care for the caregiver: coping with worry, stress, and emotional overload
- Guidance on locating appropriate supports and services within the community
- Information on advocacy initiatives designed to improve and expand services

NAMI Vermont offers at least three (3) Family-to-Family classes per year in different locations around the state.

#### **Mental Illness and Recovery:**

NAMI Vermont's Mental Illness and Recovery workshop is a free 1-day workshop introducing family members, friends, peers, and community members a one-day workshop that covers information on bipolar disorder, major depression, schizophrenia/schizoaffective disorder, obsessive compulsive disorder, panic disorder, PTSD, and borderline personality disorder. The workshop will also cover the components of recovery, evidence-based practices available in Vermont and resources and services within our state.

NAMI Vermont offers at least 4 workshops per year in different locations around the state.

**Provider Program:**

NAMI Provider Program offers 15 hours or 4 hours of training to professionals and providers who work directly with people who live with a mental health condition. The course helps providers realize the hardships that families and individuals experience and appreciate the courage and persistence it takes to live with and recover from mental illness. The course is taught by a trained team of family members, individuals living with a mental health condition, and a mental health provider.

NAMI Vermont offers two (2) 4-hour or one (1) 15-hour course per year in different locations around the state.

**In Our Own Voice:**

NAMI In Our Own Voice is a 60-90 minute public education presentation that raises awareness and reduces the stigma of mental illness and demonstrates that recovery is possible. It includes a short video, personal testimony and a Q&A that allows for honest and open dialogue. Presenters engage audiences with their brave and gripping personal journeys. The various sections of each presentation include Introduction, What Happened, What Helps, and What is Next.

NAMI Vermont offers at least fifteen (15) presentations per year in different locations around the state.

**Support Groups****NAMI Family Support Groups:**

NAMI Family Support Groups are a free, 90-minute support group of family and friends of individuals with a mental health condition where they can talk frankly about their challenges and help one another through their learned wisdom and coping strategies. The model operates differently than other, more traditional "share-and-care" groups. The NAMI Support Group model offers a set of key structures and group processes for facilitators to use in common support group scenarios. These structures come with clear guidelines to follow. When used together, they encourage full group participation in support group meetings.

NAMI Vermont offers at least five (5) support groups meeting monthly or bi-monthly around the state.

**NAMI Connection Support Groups:**

NAMI Connection is a recovery support group program for adults living with a mental health condition. These groups provide a place that offers respect, understanding, encouragement, and hope. NAMI Connection groups offer an opportunity to share the challenges and successes of coping with a mental health condition. Each group:

- Meets weekly, bi-weekly, or monthly for 90 minutes
- Is offered free of charge
- Follows a flexible structure without an educational format
- Does not recommend or endorse any medications or other medical therapies

All groups are **confidential** - participants can share as much or as little personal information as they wish. Meetings will be guided by NAMI Connection's Principles of Support.

NAMI Vermont offers at least (5) community support groups around the state and has partnered with Rutland Regional Medical Center, Brattleboro Retreat, and Vermont Psychiatric Care Hospital to offer support groups on their psychiatric inpatient units as facilitators are available.

## **Other Services**

### **Annual Educational Conference:**

Every year NAMI Vermont offers an educational conference open to all community members, professionals, peers and family members. We offer keynote presentations and workshops on a wide variety of topics. This is the only service we offer where we charge a fee to attend. There are limited scholarships available for peers and family members of limited financial means.

### **Information and Referral Line:**

NAMI Vermont offers a toll-free Referral Line during business hours providing information relating to mental health and mental health care. This is a referral line, not a hot line. We refer people to websites where they can find doctors or lawyers, provide them with information on mental health, information about our services and provide supportive listening. We cannot provide callers with referrals to specific individuals, treatments or medications. We do not offer counseling or one-on-one advocacy. We provide brochures, fact sheets and our Resource Guidebook upon request.

### **Advocacy:**

Our outreach extends to service providers, professionals, local and state elected officials, and the general public by bringing our concerns and solutions to them while deepening their understanding of the need for community-based systems of care that are peer- and family-centered in treatment, planning, delivery and evaluation of services. We advocate at the state and systems level, providing testimony before the legislature, participating in state and local meetings which help determine the shape of mental health care. We advocate to affect system change which will ensure the most appropriate care possible for peers. We do not provide advocacy on an individual level. We are not able to attend meetings with individuals or provide case management. Every year, the NAMI Vermont Advocacy Committee reviews and updates the advocacy priorities.

### **Outreach and Fundraising Events:**

NAMI Vermont staff and volunteers attend conferences, health fairs, and meetings with providers and community organizations to provide information about mental health and our services. We fight stigma and discrimination by educating our leaders, the media and the public through such events as the annual fall NAMI Vermont Walk. NAMI Vermont and affiliates regularly participate in community events to raise awareness of our support and education programs.



## Volunteer and Intern Confidentiality Agreement

I agree to maintain the confidentiality of members and staff of NAMI Vermont, individuals who contact NAMI Vermont and NAMI Vermont volunteers. All personal information concerning an individual and his or her family should be considered confidential and should not be shared, except with staff or in circumstances in which individuals pose an immediate danger to themselves or others.

I agree that I will hold organizational information, such as project and financial information, donors and potential donors, databases and other organizational practices and information in strict confidence and will not disclose or use such information outside the scope of my relationship with NAMI Vermont or without NAMI Vermont's prior authorization.

If requested by staff, I agree to provide the information needed for a background check. Results of completed background check will be kept confidential and may not necessarily preclude eligibility to volunteer with NAMI Vermont.

I hereby acknowledge that I have read and understood the above agreement regarding confidentiality and agree to abide by these terms during my tenure and at all times thereafter.

\_\_\_\_\_  
Signature of Volunteer

Date \_\_\_\_\_

\_\_\_\_\_  
Full Name (Please Print)

# NAMI Vermont Volunteer Opportunities

NAMI Vermont is a **grassroots organization** that relies heavily on support from people like you! Please complete this form in its entirety and let us know which types of volunteer activities would most be of interest to you. We will contact you soon to review the process for volunteering with NAMI Vermont. We **sincerely appreciate** your interest in being an active volunteer with NAMI Vermont!

<b>Date</b>	<b>Name (First, Last)</b>
<b>Daytime Phone Number</b>	<b>Alternate Phone Number</b>
<b>Email Address</b>	<b>Preferred Method of Contact</b> <input type="checkbox"/> Email <input type="checkbox"/> Daytime Phone <input type="checkbox"/> Alternate Phone
<b>Mailing Address (Street/PO Box/Apt #)</b>	<b>Mailing Address (City, State, Zip)</b>
<b>How did you learn about NAMI Vermont?</b> <i>(please check ALL that apply)</i> <input type="checkbox"/> Newspaper <input type="checkbox"/> Workplace <input type="checkbox"/> Mailing <input type="checkbox"/> Word of Mouth <input type="checkbox"/> Healthcare Provider <input type="checkbox"/> Poster <input type="checkbox"/> Website <input type="checkbox"/> Social Media <input type="checkbox"/> NAMI National <input type="checkbox"/> Other: _____	
<b>Did a NAMI Vermont member refer you?</b> <i>(If so, please include his/her name so we can say thanks!)</i>	
<b>How would you like to be involved with NAMI Vermont?</b> <i>(please check ALL that apply)</i> <input type="checkbox"/> <b>SHARE YOUR STORY...</b> Everyone has a story to tell and we'd love to hear yours! <input type="checkbox"/> <b>SUPPORT NAMI MINDWALK...</b> Participate in the walk, form a team, get pledges, or help on the day of the event. <input type="checkbox"/> <b>HOST A LOCAL FUNDRAISER...</b> Organize a yard sale, host a fundraising night at a local restaurant, or celebrate a birthday by raising money for NAMI VT in lieu of gifts. We can offer you support. <input type="checkbox"/> <b>PROVIDE OUTREACH &amp; PROMOTE OUR PROGRAMS...</b> Distribute educational and promotional materials throughout your community. <input type="checkbox"/> <b>SERVE ON A COMMITTEE...</b> Consider serving on one of our various committees or subcommittees. <input type="checkbox"/> <b>BE A CHAMPION VOLUNTEER...</b> Provide administrative support in the office, help during the annual conference or business meeting, or volunteer in some other capacity. <input type="checkbox"/> <b>SERVE AS AN ADVOCATE...</b> Learn how to testify to serve as an advocate to improve the lives of those living with mental illness. <input type="checkbox"/> <b>BECOME A TEACHER/FACILITATOR...</b> Complete training to lead a program, class, workshop, or support group in your community. <i>(Please see reverse side to indicate which program(s) you are most interested in leading.)</i>	
<b>If you selected "BECOME A TEACHER/FACILITATOR" on the box above, please indicate which program, class, workshop, or support group is of interest to you.</b> <i>(please check ALL that apply)</i>	
<input type="checkbox"/> <b>PROVIDER PROGRAM...</b> A course offered to Mental Health Care Providers/Professionals during business hours <i>(Peers, Family Members, and Mental Health Professionals needed)</i>	
<input type="checkbox"/> <b>FAMILY-TO-FAMILY CLASS...</b> A 12-week class offered to family members of a loved-one with mental illness <i>(Family Members needed)</i>	
<input type="checkbox"/> <b>MENTAL ILLNESS &amp; RECOVERY WORKSHOP...</b> A one-day workshop offered to the public on mental illness, recovery, and available resources <i>(Peers, Family Members, and Mental Health Professionals needed)</i>	
<input type="checkbox"/> <b>IN OUR OWN VOICE PRESENTATION...</b> A structured, 90-minute presentation on living well with mental illness <i>(Peers needed)</i>	
<input type="checkbox"/> <b>FAMILY SUPPORT GROUP...</b> A 90-minute support group for family members of a loved-one with mental illness that meets once or twice a month <i>(Family Members needed)</i>	
<input type="checkbox"/> <b>CONNECTION SUPPORT GROUP...</b> A 90-minute peer support group that offers encouragement, empowerment, and mutual understanding while living in recovery <i>(Peers needed)</i>	

<b>Employee/Volunteer</b>		
Name:		
Address:		
City:	State:	Zip:
Home Phone:	Work Phone:	
Cell Phone:	E-mail:	
Date of Birth:		
Are there any allergies or health concerns that might warrant emergency services?		

Emergency Contact Information		
Name:	Relationship:	
Address:		
City:	State:	Zip:
Home Phone:	Work Phone:	
Cell Phone:	E-mail:	

Alternate Emergency Contact Information		
Name:	Relationship:	
Address:		
City:	State:	Zip:
Home Phone:	Work Phone:	
Cell Phone:	E-mail:	

## **Appendix III: Purchasing Policy, and Purchase Order & Requisition Form**

### **NAMI Vermont Purchasing Policy**

Approved by the Board April 2016

It is essential that uniform purchasing policies be followed by NAMI Vermont staff, officers and directors, and volunteers. In order to maintain financially sound business practices, the following policy will govern purchases, approvals, and reimbursements. Failure to follow this policy may result in revocation of delegated authority, denial of reimbursement, delay in payment, or other sanction up to and including personal liability for unauthorized purchases as determined by the Finance Committee of the Board of Directors.

#### Tax Exempt Status

NAMI Vermont is exempt from paying Vermont sales tax. The purchaser of goods or services should inform the supplier of that fact. A copy of the tax exemption certificate should be provided if so requested by the vendor.

#### Personal Purchases

NAMI Vermont will not purchase any supplies or equipment for personal use by staff, officers and directors, and volunteers.

#### Local Purchasing

NAMI Vermont will endeavor to support Vermont business in purchasing goods and services.

#### Purchase Orders

A purchase order system and form(s) shall be implemented in accordance with the Purchasing Policy.

1. All purchases over \$25 that are non-recurring expenditures will follow the purchase order system requiring approvals.
2. All purchases that are not itemized in the budget will follow the purchase order system requiring approvals.
3. All purchases in any amount must have accompanying receipts.

#### Bidding Requirements

All purchases of goods or services of \$1,500 or more that are non-recurring must have three (3) quotations. The breaking up of a purchase into individual requisitions to avoid the bid process (pyramiding) is not permitted. Responses shall be in writing except that those under \$2,000 may be verbal and noted by a signed and dated hard copy memo in the file.

#### Approval of Purchases and Check Signing

1. All purchase orders must be approved by either the Executive Director or the Treasurer.
2. All checks cut in the amount of \$1,000 or more, with the exception of bills deemed routine (see list of vendors) require the signatures of two check signers.
3. All purchase orders of \$1,000 or more must be approved by the Treasurer or President in addition to the Executive Director.
4. All purchase orders of \$2,500 or more must have the approval of the Executive Committee.

### Reimbursement for Authorized Purchases

1. All purchases made by staff, officers and directors, and volunteers for NAMI Vermont must have prior approval from the Executive Director to guarantee reimbursement, providing that all other requirements of this policy are met. In the case of no Executive Director at the helm, the approval of Treasurer and President shall suffice.
2. An approved purchase order and original receipt is required for reimbursement.



## FY 2020 PURCHASE ORDER FORM

*Please attach original receipts (required for reimbursement) — Only pre-approved purchases are guaranteed reimbursement at pre-approved amounts.*

Person Requesting	
Date	
Vendor	
Description	
Payment Method	
Total Amount	\$
Date Needed By	N/A
Account #1	<b>Choose Account</b>
Class #1	<b>Choose Class</b>
Estimated Amount	N/A
Actual Amount	\$
Account #2	Choose Account
Class #2	<b>Choose Class</b>
Estimated Amount	N/A
Actual Amount	\$
Account #3	<b>Choose Account</b>
Class #3	<b>Choose Class</b>
Estimated Amount	N/A
Actual Amount	\$

**APPROVAL:**

\_\_\_\_\_

Executive Director

\_\_\_\_\_

Date

# Language

The use of certain words or phrases can express gender, ethnic, or racial bias, either intentionally or unintentionally. The same is true of language referring to persons with disabilities, which in many instances can express negative and disparaging attitudes.

For decades, persons with disabilities have been identified by their disability first, and as persons, second. Often, persons with disabilities are viewed as being afflicted with, or being victims of, a disability. In focusing on the disability, an individual's strengths, abilities, skills, and resources are often ignored. In many instances, persons with disabilities are viewed neither as having the capacity or right to express their goals and preferences nor as being resourceful and contributing members of society. Many words and phrases commonly used when discussing persons with disabilities reflect these biases. NAMI Vermont strives to use person-first language.

Listed below are examples of negative, stereotypical, and sometimes offensive words and expressions. Also listed are examples of preferred language, which describe without implying a negative judgment. Even though their connotations may change with time, the rationale behind use of these expressions provides a basis for language reevaluation. The specific recommendations are not intended to be all-inclusive. The basic principles, however, apply in the formulation of all person-first language.

*Information obtained from the American Psychological Association. For more information: [www.apa.org](http://www.apa.org)*

Older Language	Preferred Language
Mentally ill	People living with a mental health condition
<i>The term mentally ill defines a group of people as their illness rather than as people. Besides that, it also has negative overtones.</i>	<i>We prefer the more neutral and people first language of "people living with..."</i>
Schizophrenic	Person living with schizophrenia
<i>The term schizophrenic defines the person as their illness. We want to see people first and their illnesses second.</i>	
Consumer	Client, peer, or person with a mental health condition
<i>The term "consumer" originated because people living with mental illnesses used or "consumed" services. The reality is that we all use services. Consumer ignores the fact that</i>	

<i>people living with mental illnesses are resourceful and contributing members of society.</i>	
Suffering from a mental illness	Experiencing a mental health condition
<i>People living with mental illness can live well in recovery. We do not want to assume that having a mental illness means <u>suffering</u>. Someone living with a mental illness can say that the illness is causing suffering in their life, but we should not make that determination for them.</i>	
<b>Older Language</b>	<b>Preferred Language</b>
Bipolar disorder requires ongoing treatment	Essential components of the treatment process for people living with bipolar disorder include medication, psychotherapy, support groups and education about the illness.
Become ill	Develop an illness
Consumer supports	Recovery supports
Disabled	Experience a disability related to the illness
Doctor	Healthcare provider
Live independently	Be a full member of the community (while maintaining a good standard of living)
Mental illness is a brain disorder	Mental illness is a medical illness
Normal (behavior)	Usual (behavior)
People with schizophrenia (or) a schizophrenic	People (or person) living with schizophrenia
Stable person	Person who has advanced in recovery

## Appendix V: Complaints & Grievance Procedure

### **VOLUNTEER GRIEVANCE/COMPLAINT/INTERNAL CONFLICT PROCEDURE**

A grievance/complaint/internal conflict resolution is defined as a remedy to a circumstance in which an individual takes issue with an action taken or decision made by staff or NAMI member that cannot be resolved through informal conflict resolution avenues.

Actions taken regarding any grievance/complaint are addressed according to NAMI Vermont Policies and Bylaws.

#### **Instructions for Volunteer(s)**

1. A formal grievance/complaint should be filed within a reasonable period of time following origin of the incident or the date of learning of the problem unless it is related to a contested report.
2. When a formal grievance/complaint is filed, all the information requested on the form must be provided. The description of the grievance/complaint should include the names of other persons involved in the act, omission or occurrence.
3. The normal course of conflict resolution and the grievance complaint procedure is as follows:
  1. First try an informal conflict resolution process with the parties involved.
    - a. The parties involved (including as appropriate Affiliate members) should address the issue together to find resolution. If no resolution, take next step.
    - b. Parties should consult with the appropriate staff member. If the informal process does not resolve the conflict, take next step.
    - c. Discuss issue with Executive Director in resolving the issue before filing a formal grievance/complaint. If not resolved within a reasonable amount of time, then the grievant may file a grievance form.
  2. File grievance/complaint/internal form with Executive Director or President of NAMI Vermont.

Following receipt of notification of actions above, the grievant has 30 days to refer the grievance/complaint to the next step unless the time limit is extended by agreement of the parties. The grievant is responsible for maintaining copies of the documentation for his or her records.

**Report of Investigation:** After a grievance/complaint has been submitted at Step 4 in the form below, each report will follow the same investigative policy rule as outlined in the NAMI Vermont Policies and Bylaws. A prompt investigation will be conducted, and a written report will be sent to the NAMI Vermont Board of Directors within 90 days of the date on which the allegations were received. The Board of Directors will take appropriate action on the report's recommendation(s).

# FORMAL GRIEVANCE/COMPLAINT

**THIS FORM MUST BE COMPLETELY FILLED OUT**

Name of Grievant (Please Print):	Phone:
Role/Position:	Email:

Date, time and place of event leading to grievance/complaint:	Date you became aware of the event, <i>(if different)</i> :
---	---

Detailed description of grievance/complaint including names of other persons involved, if any:

(Provide additional documentation if necessary)

Applicable sections of Volunteer Handbook:

Proposed solution to grievance/complaint:

Grievant: File a copy of this form with the Executive Director or the Board President and retain a copy for your records, if necessary. You should receive a response (not necessarily a resolution) within 10 days.

Step	Steps Taken <i>(Please Print Name)</i>	Date	Grievant's Signature	Date
1	Spoke with:			
2	Spoke with:			
3	Spoke with:			
4	Filed with:			