Executive Director Onboarding Course Checklist Phase 2



Your ED Role

Recommended Time Frame

3 Months | 6+

- Complete ethics-related learning
- O Determine your baseline competencies
- Plan to get a crash course in need-to-know areas
- Tap into local ED groups
- Connect with local nonprofit associations
- Oraft your elevator speech
- Celebrate your first win!
- Evaluate progress toward onboarding goals

6+ Months

- Continue professional development
- Review previous EDLE content
- Take advocacy training
- Consider succession planning

Your NAMI Organization

- Review any fund development plan
- Review any operations plan
- Identify top strengths and areas to address
- Learn about the local/state/federal mental health system
- Meet with community stakeholders

- Review your organization's governing documents (especially bylaws)
- Continue to build relationships with external stakeholders
- Join coalitions and local alliances
- Establish a relationship with local media
- Revisit critical document
- Reflect on the past year

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Recommended Time Frame 3 Months 6+ Months Connect with other Continue to build relationship with NAMI National, state **NAMI EDs** organization, and affiliates Attend an ED council meeting Learn about NAMI programs Connect with NAMI teams as Review content from previous needed NAMICons and other informational content Get to know NAMI's systems (720&360)Review NAMI marketing and Participate in a NAMI communications guidance program Continue to build relationship with NAMI National and other Meet with state organization (if affiliate) NAMI organizations Have an affiliate meeting (if state organization)

NAMI National