

# EXECUTIVE DIRECTOR ONBOARDING ROADMAP



**nami**

**National Alliance on Mental Illness**



## Objective

The objective of this roadmap is to assist new Executive Directors in their onboarding process and to act as a reference for new and existing Executive Directors.

## Accessibility

This roadmap is best viewed in Adobe Acrobat to use the provided interactions or printed for note taking. You may navigate pages by using your scroll wheel or by clicking directly on the table of contents.

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Dear new NAMI Executive Director(s),

Welcome to your new role as Executive Director (ED) within the NAMI Alliance! Whether this is your first time as an ED, or you have run one or more organizations, you are now part of a special group of EDs across the U.S. who oversee the day-to-day operations of our grassroots network and help advance the NAMI mission in diverse local communities.

Like all other executives, you will oversee the business operations of your NAMI organization and manage a board of directors. You will manage programs, join coalitions, fundraise, support your team, and everything else that falls under the Executive Director "hat." While you are doing this important work, remember that NAMI's mantra, "You are not alone," applies to YOU.

You are now part of a community of hundreds of other NAMI Executive Directors and a National team that is here to cheer you on and provide relevant resources, like this one, throughout your journey. We encourage you to engage in opportunities across the NAMI Alliance to learn, share your ideas, and participate in this amazing community.

The NAMI mission and movement is life-changing and impactful. What we've all committed to changes lives. Nonetheless, it is critically important that you prioritize your health. You can set an example for your staff and your local community of how to support mental health in the workplace by practicing self-care consistently.

Thank you for choosing to bring your talents and passion to this important mission. We wish you the very best in your new role!

With gratitude for all you will accomplish in your local community to advance the mission and movement of NAMI,

**Annette Gantt, Chief Field Relations Officer**  
Alliance Relations



# Chapter 1: Roadmap to Success

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## Introduction

Congratulations on your new position as a NAMI Executive Director (ED)! Executive Directors at NAMI are a group of dedicated, passionate people who advance and oversee the mission, vision and strategies of NAMI State Organizations (NSOs) and NAMI Affiliates (NAs). This position comes with many rewards, but we also recognize you may encounter challenges along the way.

The goal of this roadmap is to help guide you as you begin your journey as an ED so that you feel supported and empowered in your work and prepared for what lies ahead. We want to help set you up for success in your new role and have developed a toolkit, "Executive Director Onboarding: A Roadmap for Success," which intentionally takes a phased approach. Whether you are a new or seasoned ED, we hope you will find something useful in this roadmap and accompanying toolkit.

This roadmap is one part of a larger toolkit focused around supporting new NAMI EDs. Components of the ED Onboarding Toolkit include:

- this roadmap, a step-by-step guide with considerations at each step;
- a curated list of resources that new EDs can use throughout the onboarding process; and
- guidance for boards when bringing on a new ED.

## How to Use This Roadmap

This roadmap is designed to supplement any onboarding plan provided by your organization, which can provide you with organization-specific information that this roadmap does not include. If you are a new NSO ED, we encourage you to review this roadmap, and the rest of the toolkit, in partnership with your NAMI Field Capacity Building Point of Contact. They are here to support you as you begin your journey with NAMI. New NA EDs are encouraged to review this roadmap with their NSO.

As a new NAMI ED, you should think about the following as you adjust to your new position:

- getting to know the organization you have joined;
- getting to know NAMI as a whole;
- getting to know your community, including the mental health landscape; and
- getting to know the Executive Director role.

In the roadmap that follows you will find guidance on suggested steps and timing for different tasks related to each of these four areas, as well as important information with which to familiarize yourself. We know the onboarding process can be overwhelming and vary greatly, so please adjust this roadmap as needed to make it work for you. The time frames and tasks listed within each phase are flexible. Your focus on certain areas may vary depending on your experience coming into the role, the structure of the organization you are joining, and the level of preparation for your arrival, as well as other factors.

As you go through this roadmap, you will need information related to your organization's operations and structure. You can find this information from a variety of sources, including:

- materials a previous ED (if the organization had one) provided as part of their transition;
- materials from your organization's board;
- your organization's website, social media, emails and annual reports;
- any staff at the organization;
- your NSO (if at an NA); and
- NAMI National (NAMI 360/720 databases, staff, documentation).

If you have any questions regarding this roadmap, please contact [fieldcapacity@nami.org](mailto:fieldcapacity@nami.org).





## Chapter 2: Your First Week

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### Getting to Know Your Role

#### Goal-Setting

Taking a few minutes to write down a few goals for your onboarding can help you determine where you want to go and how to get there. If you have the end point, you can then work back through the steps it will take to get there. Having these goals in place will help you determine what areas to focus on during your onboarding and help you stay on track. The goals you create should be unique to your areas of strength and opportunity, as well as those of the organization.

Here are some questions to guide your thinking around these goals:

- How do you want to feel at the end of the first week? 30 days? 90 days? Six months? A year?
- Whom do you want to meet during the first week? 30 days? 90 days? Six months? A year?
- What do you want to have a solid grasp of?
- What actions do you want to take during your onboarding?
- What story do you want to be able to tell 90 days in? Six months? A year? What message do you want to send to the board, staff, the community and other stakeholders?





## Getting to Know Your Role, *continued*

Keep your goals simple and attainable. Additionally, giving each goal a timeline and/or measures can be helpful. [Check out this resource to learn more about setting “SMARTIE” goals<sup>1</sup>.](#)

For example, you might set a goal of having clarity around the financials by the end of the first month. Maybe you want to meet with three donors each month during onboarding or secure a meaningful grant by the six-month mark. Be sure to consider any goals your board may have set during your first year.

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## Getting to Know Your Organization

### Review Critical Documents

During your first week as a new ED, do a general read-through of the following important documents. The goal in looking at these documents during the first week is not to spend an excessive amount of time combing through every detail, but to get a quick overview of where the organization is right now. This will help you plan priorities and next steps, including any outstanding issues you need to address immediately. As you review these documents, write down any questions you have and plan to review with the appropriate person.

- Any transition and/or onboarding plan provided to you.
- Staffing chart.
- Board of directors.
- Strategic plan (if there is one).
- Bylaws.
- Policies and procedures.
- Charter (if NSO) or Affiliate agreement (if NA).
- Current contracts and agreements.



### Transition and Onboarding-Related Documents

It is suggested that the ED and board of directors, in conjunction with other leadership at the organization, create a transition plan prior to bringing on a new ED. A transition plan includes how the organization will approach and manage the leadership transition. An onboarding plan provided by the organization will supplement this roadmap and help guide you through being a new employee at the organization, including information about regular staff meetings and employee benefits enrollment.

Ideally, these documents will include important information about the organization’s systems, important contacts, projects, etc. This will help you as a new ED quickly find the information you need. As a new ED, you may or may not have these documents to reference, depending on what steps the board and leadership took prior to your arrival.

### Strategic Plan

Find out if there is a strategic plan in place for your organization and how it is being implemented. If the NAMI organization you have joined has a strategic plan, reviewing it will allow you to quickly gauge the key goals and areas of focus of the organization.

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## Getting to Know Your Organization, *continued*

### Organizational Bylaws

Reviewing your organization's bylaws will help inform how the organization is run, how governance decisions are made, and how conflict and grievances should be resolved. It is imperative to know and follow the organization's bylaws and good practice to review them every three years, and, if necessary, revise to align with any structural changes.

Do a general read-through during the first week with a plan to set aside time later in the year to do a deeper dive into different areas in the bylaws.

#### (NSOs) State Charter Agreement

This is a legal document between NAMI National and the NSO that grants the NSO its status and ability to use the NAMI name and brand. Pay close attention to the following sections:

Section III
Obligations of State Organization
Focuses on the obligations of a NSO under the Agreement.

Section IV
Intellectual Property and Confidential Info
Focuses on the scope and use of NAMI's IP, specifically the logo.

#### (Affiliates) Incorporated Affiliate Agreement

This is a legal document between NAMI National and the Affiliate that grants the Affiliate its status and ability to use the NAMI name and brand. Pay close attention to the following section:

Section III
Obligations of State Organization
Focuses on the obligations of a NSO under the Agreement.



Reach out to [standards@nami.org](mailto:standards@nami.org) if you have questions about any language in the state charter or Affiliate agreement.

### Policies and Procedures

Get acquainted with the organization's policies and procedures (board and operations). This will help you determine how to proceed in different situations you may encounter as an ED. You can also get a sense of what policies and procedures may be missing or need to be strengthened, which you can address later.

Key policies and procedures:

- **Grievance:** How should I, staff and the board respond to complaints from others? How do I file a complaint? How are complaints documented? What actions are taken?
- **Media:** What do we do with media inquiries? What inquiries do we respond to? What partners do we engage? How do we go about engaging these partners?
- **Ethics:** What does ethical conduct look like? For board members? For staff?

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## Getting to Know Your Organization, *continued*

- **Whistleblower:** How are individuals who report illegal activities protected from retaliation? How does this policy promote a culture of accountability?
- **Financial:** Who can spend money or commit the organization to a financial obligation? How are budget overages managed?
- **Fundraising:** How will the organization decide whether to accept a donor gift? In what situations may a donation not be accepted? Do fundraising methods need to be spelled out? What methods are off the table?
- **Data management:** What data is collected, and how it is stored/used? What controls are in place to protect data the organization collects? How is donor, member and program participant privacy protected? How can individuals opt out of specific uses of their data?
- **Conflict of interest:** What constitutes a conflict of interest? How do individuals disclose a potential conflict of interest? How are conflicts of interest addressed?
- **Document retention:** How does the organization store and destroy documents?
- **Compensation:** How does the organization approach employee compensation?
- **Diversity, Inclusion and Nondiscrimination Policy:** How is the organization committed to diversity, inclusion and nondiscrimination?

### Current Contracts and Agreements

What has the organization been contracted to do? How are contracts managed? What are the deliverables? What has the organization contracted for? When do contracts expire? Are there existing funding or partner agreements?

## EXAMPLES



Has your organization outsourced any administration to a third-party company?

**Important note:** NAMI NSOs and NAs are required to maintain their independence from other agencies, organizations and advocacy groups by not assigning or transferring management, program offerings and other protected intellectual property to third parties. You should review all third-party contracts to ensure that the provisions don't conflict with the independence clause within your organization's bylaws.

## Introductory Period

### Meet the Leadership Team

During the first week, meet with or set up meetings with the executive team of the organization. These are the key people driving the organization in different areas. This could be staff directors (programs, development, operations, finance, etc.). It could also include board members or volunteers, especially if you are the only staff person at the organization.

### Meet the Staff Team

Hold an all-staff meeting and introduce yourself to the organization. If the organization has a small staff, you may also consider scheduling one-on-one meetings. Use the time to get better acquainted and find out what each has to say about the organization, their role and their responsibilities, and share some things about yourself.

### Learn About Your Board

#### Board Members

Schedule visits with board members. Get to know their:

- skills, experience and attributes,
- goals for their term and what they want to contribute,
- motivations - what drives them as a board member, their "why."



#### Board Meetings

Familiarize yourself with board meetings.

- How often does the board meet?
- How are meetings structured/organized?
- Who runs the board meetings?
- What do meeting agendas look like?
- What types of topics are discussed or what decisions are made?



#### Committees

Familiarize yourself with your committees.

- Are there committees?
- How many and in what areas?
- How are they structured? How often do they meet?
- What are their deliverables?
- What does participation look like?
- What do efforts around board recruitment look like?
- Has an assessment been done of recruitment needs?



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## Introductory Period, *continued*

### Review Financials

You may also want to review annual reports, year-end financial statements and/or grant reports to get a better picture of the organization's financial status.

#### 1. Accounts

- Where does the organization have accounts?
- Who has access to the accounts?
- What is the cash-flow situation?
- How much of a reserve is there?

#### 2. Budget

- Review current and previous budgets.
- What is the organization's fiscal year?
- What is the process and timeline for creating the annual budget?

#### 3. 990s

- Have 990s been filed in a timely manner?

#### 4. Past Audits

#### 5. Grants

- Who are your grantors? When are their reports due? What are the metrics they require? Who are the contacts at the granting organizations? Reviewing past grant reports can help you understand what you are obligated to report.



## Getting to Know NAMI

### Learn Your NAMI National Field Capacity Building Point of Contact

When you first become an ED, it is helpful to know who your army of supporters is. If you are an NSO ED, a good place to start is with NAMI's Field Capacity Building (FCB) team. If your regional point of contact has not already reached out, email [fieldcapacity@nami.org](mailto:fieldcapacity@nami.org) to be connected to the Field Capacity Building point of contact for your region. As an NSO ED, this contact will work closely with you to provide day-to-day support, technical assistance, training, resources, and tools related to building organizational capacity.

If you are an NA ED, your NSO leaders will be a source of support in areas related to organizational development. Start making these connections early on. This coordination between an NA and NSO is consistent with NAMI's federated model and the roles and responsibilities of the Alliance, discussed more in the "[first 30 days](#)" section. However, there may be times when an NA ED can reach out to NAMI's Field Capacity Building team. To learn more about how the team supports the Alliance, see this [background on the regional model](#)<sup>2</sup>.

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## Getting to Know NAMI, *continued*

### Get Added to the Executive Director Mailing List

When reaching out to the Field Capacity Building team, ask to be added to the Executive Director Council list and the online Community of Practice for EDs ([community.nami.org](https://community.nami.org)). The communication EDs receive from NAMI National may include general information about NAMI programs and initiatives, grant opportunities, research opportunities and more.

The Executive Director's Council is one of five advisory councils made up of NAMI leaders who serve at the pleasure of the NAMI National board of directors and provide guidance and support to them. The ED Council is open to all Executive Directors from NSOs and NAs. This council provides opportunities to network and share challenges unique to the ED role.

To join the Community of Practice, you will need to create a NAMI.org account if you do not already have one. When you first sign in, you will need approval from NAMI to access the forum. Approvals take place within 24 hours of account creation. Once you receive access, you will be able to see and participate in the ED Council forum.

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#### Expanded links:

<sup>1</sup> <https://www.managementcenter.org/resources/smartie-goals-worksheet/>

<sup>2</sup> [https://www.dropbox.com/s/sa0enyxs3e76xdq/Regional%20Model\\_Backgrounder.pdf?dl=0](https://www.dropbox.com/s/sa0enyxs3e76xdq/Regional%20Model_Backgrounder.pdf?dl=0)



# Chapter 3: Your First 30 Days

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## Getting to Know Your Role

### Mark Your Calendar

It's especially important as a new ED to be intentional about your time, as well as make sure you participate in important meetings and events.

First, mark key dates on your calendar: board meetings, executive committee meetings, staff meetings, legislative dates, board retreats, coalition meetings, conventions, conferences, etc.

- Don't forget the next NAMI Convention and NAMI Executive Directors' Leadership Exchange (your Field Capacity Building point of contact can give you this information). See the **"Six Months"** section for more information about these events.

Consider intentionally setting aside time in your calendar to read, review, learn, etc. Everyone will want some of your time, and you will be pulled in different directions; having established time set aside to do important work can be helpful.



## Getting to Know Your Role, *continued*

Start mapping out the events your organization will be organizing or supporting in the next year. Develop a timeline that helps you plan in advance when events are on the horizon.

Do not overcommit. Pace yourself and build in time to breathe.

## Getting to Know Your Organization

### Learn the Organization's History

Familiarize yourself with past events, regular fundraisers, key individuals, etc.



- Who have been key supporters of this organization thus far? What did their support look like?
- What role has the organization historically played in the community? What has its presence looked like? Has this shifted? If so, why has this shifted?
- Has the mission or vision changed over time? How?
- Make note of different accounts of the organization's history.

### Meet with Staff One on One

If you were not able to during the first week, meet with the organization's staff individually during the first 30 days.

Figure out the following through conversations and reviewing the organizational staffing chart:

- Who does what?
- How are tasks divided?
- Who reports to whom?
- How does staff work with the board?

### Conduct a Basic Risk Assessment

Undergo a [basic risk assessment](#) with the help of the board and staff to determine and prioritize risks to the organization in different areas. Gauge how likely a risk is to occur and the potential implications of a risk for the organization.

Going through a risk-assessment process will help you identify any issues you will need to address first. Part of this process should involve developing a plan for mitigating or responding to risk. You may need to bring in some outside help with this, such as, a Certified Public Accountant.



Major areas of risk for ED to assess:

- **Nonprofit Compliance:** Is the organization compliant with state laws? Has the organization maintained its nonprofit status? Does the organization have general liability and Directors & Officers insurance? Is the organization compliant with its NAMI charter or affiliate agreement?

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## Getting to Know Your Organization, *continued*

- **Finances:** Are there appropriate financial controls in place? Are tax filings done on time?
- **Governance:** Are the bylaws being followed? Is the minimum number of board members being met?

Other areas of potential risk include:

- program fidelity;
- mission creep (veering from the organization’s stated mission);
- public relations;
- fundraising; and
- volunteers.

### Learn the Systems Used

Get a list of the systems and technology the organization uses, and request access to them. This includes the website, social media, accounting, data collection, payroll, etc.



- Get trained on the organization’s systems by staff or a relevant professional.
- Learn what data is being collected, how it is being used, who has access, and how to access stored data.
- Learn the basic operations of these systems. Who has access to what? Who is responsible for keeping information updated?
- It will also be critical to learn about the systems NAMI uses and requires for NSOs and NAs to input program data, organizational contact information and more. You can find more about this in the **“90 Days” section**.

### Review the Following

Write down any questions you have after reviewing these documents, and make a plan to ask the appropriate contact.

#### LAST SIX MONTHS OF BOARD MEETING MINUTES

After you get a basic understanding of how the board is structured during the first week, take a look at past board meeting minutes. This will provide you with an overview of recent events and decisions that have been made.

#### STAFFING/HUMAN RESOURCES DOCUMENTS

Employee handbook

Past performance assessments

Job descriptions

Annual reviews

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## Getting to Know Your Organization, *continued*

### Review Programs with Staff

Meet with programs staff or volunteers at the organization to learn the following:



- What programs does the organization offer?
- How are programs offered? (in-person, virtual, and/or hybrid)?
- Who are your trained facilitators and teachers?
- How many people and what communities are served?
- What makes the programs special? What gap(s) do they fill?
- What does your NAMI do? What do they not do?

Through these conversations, you will get a sense of which programs may need more trained facilitators, and can then work with the appropriate individuals to develop a plan around this.

### Get a Sense of Your Organization's Reputation in the Community

Your understanding of the organization's value and reputation will expand the more you engage with people in the community, but try to get an initial baseline. This will be helpful in gathering information to determine your priority areas and can contribute to your risk assessment.

- Ask staff and board members how people respond when you tell them you work for or volunteer for the organization.
- Is there a trusted colleague you could ask about how the organization is perceived?
- What can you garner from social media and/or online reviews?
- Review programmatic and any customer service-related feedback.
- Look at the number and depth of partners, collaborations, volunteers and members. Are the partners all similar types of organizations, or are they diverse? Do they represent diverse communities?



## Getting to Know NAMI

### Complete the An Introduction to NAMI for New Leaders Course

This course will give you a basic overview of the three parts of the NAMI Alliance (NAMI National, NSOs and NAs) and how they function together, as well as teams at NAMI National and what they do. This understanding is critical as you navigate your role as ED of a NAMI organization. You can access the course [here](#)<sup>3</sup>.

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## Getting to Know NAMI, *continued*

### Review Important NAMI Documents

#### NAMI ROLES AND RESPONSIBILITIES<sup>4</sup>

Approach this first by examining the roles and responsibilities related to your part of the NAMI Alliance: NSO or NA.

Next, explore the roles and responsibilities of other parts of the NAMI Alliance. Think about the relationships among these roles and responsibilities.

Apply the content to your role as ED- Write down what each of the points in each section means in the space you are in and how they are achieved. For example, there might be a specific program in your state that relates to a certain responsibility.

#### NAMI STANDARDS OF EXCELLENCE<sup>5</sup>

What are considered best practices for NAMI organizations? How does your State Organization or Affiliate comply with the NAMI standards of excellence?

#### Expanded links:

<sup>3</sup> <https://learning.nami.org/courses/an-introduction-to-nami-for-new-leaders/>

<sup>4</sup> [https://www.nami.org/NAMI/media/NAMInet/Ops-Gov/Roles-and-Responsibilities-in-the-NAMI-Alliance\\_6-20-2017.pdf](https://www.nami.org/NAMI/media/NAMInet/Ops-Gov/Roles-and-Responsibilities-in-the-NAMI-Alliance_6-20-2017.pdf)

<sup>5</sup> <https://www.nami.org/NAMI/media/NAMInet/Ops-Gov/STANDARDSOFEXCELLENCEBODApprovedDecember2010.pdf>



# Chapter 4: Your First 90 Days

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## Getting to Know Your Role

### Determine Your Baseline Competencies

Related to goal-setting, take some time to think about where your skills and experiences are. Ninety days in, what areas do you feel like you have the skillset to take on? For example, maybe you feel comfortable working with financials, strategic planning or fundraising. In what areas do you feel less comfortable?

Write down a couple of areas in which you would like to grow related to the role, then make a plan to skill up in these areas, including regularly reassessing your professional development goals and progress.

### Get a Crash Course in Any Need-to-Know Areas

Once you have identified the areas in which you would like to grow, you should determine whether any of them require immediate “skilling up.” Gather information and resources for a crash course in any areas on which you quickly need to get up to speed. Try to stick to one to two areas.



## Getting to Know Your Role, *continued*

### Draft Your Elevator Speech

The way you present your organization in the community from the beginning is important. Ninety days in, spend some time [crafting your elevator speech](#)<sup>6</sup>. Keep it short and sweet (a minute or less). If you met someone at a party who asked what you do, how would you answer questions about what your NAMI organization is and what you do for the community? Whether you are talking to a person at a party or an important funder, this concise messaging will come in handy in a variety of situations.

This elevator speech should do the following:

- convey the organization’s mission and its importance;
- provide clear, consistent messaging across the organization; and
- invite people in and excite them.

One activity that can be helpful in crafting an elevator speech is determining the organization’s value proposition. To help with this, NAMI National has created a Value Proposition worksheet that is available as part of the [strategic/action planning roadmap](#)<sup>7</sup>.

### Connect with Local Nonprofit Associations

Local and state nonprofit associations can be sources of education and support for you in your role. The opportunities available and the organizations offering them will differ based on your geographic area. For example, some organizations will offer resources for nonprofits, including webinars, networking groups and/or consulting services.

Find your state association for nonprofits through the [National Council of Nonprofits](#)<sup>8</sup>.



Try doing a Google search with key words like “nonprofit + geographic area” to research what is available in your area.

Note: Some nonprofit associations will have a membership fee.

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## Getting to Know Your Role, *continued*

### Tap into ED Groups

In addition to NAMI's ED Council, there are other opportunities to engage with EDs outside of NAMI. In some geographical areas, or through online platforms, there are opportunities to connect with other nonprofit EDs to network, receive support, and gather resources and advice. One approach is to ask nearby nonprofit organizations, especially those with similar missions, what they do to support EDs. Check out what options are available in your area and/or check out online groups on the resource list accompanying this roadmap, and get connected.

### Evaluate Progress Toward Onboarding Goals

It's important to regularly take a moment to evaluate where you are with your onboarding goals. Are you making steady progress, or are you off-track in reaching the goals you set for your onboarding? If the latter is true, why? What can you do to get back on track? Do you need to alter some of your goals or change the timeline?

### Log and Celebrate Your First Win!

It is helpful to have some sort of "win" within your first 90 days. This can be a small or big win, but it should be something that builds confidence in the community and gets the board and staff excited about what is to come. Maybe it is acquiring a new funding source, or a new partnership, or working to enhance an initiative that was in the beginning stages when you started.



## Getting to Know Your Organization

### Review Any Plans Related to Fund Development and Organizational Operations

For any current fundraising or fund development plan:

- How does the organization plan to generate revenue?
- Who is involved in fund development?
- How closely is this plan being followed?

For any current operation plans:

- How does the day-to-day work help to accomplish the organization's strategic goals? An operations plan will help you understand how goals will be achieved and areas that may need more attention in planning out.

Write down any questions you have after reviewing these documents, and make a plan to ask the appropriate person.

### Identify the Organization's Strengths and Top Challenges to Address

Around 90 days in, review the notes you have taken thus far and the information you have gathered. You also can utilize past organizational assessments such as the Organizational Health Assessment Survey (OHAS) conducted by NAMI National. At this point, you should have some idea of where the organization is, where they have been, and a vision for the future. Use this information to drill down on the top strengths and areas for improvement. What is going well at the organization? What are your top priorities? Make a plan to address each of them in a specified time frame.

## Getting to Know Your Community

### Meet with Community Stakeholders


Relationship-building is a critical piece of your onboarding. Start scheduling introduction meetings with key individuals or organizations in the community:

- supporters (financial, programmatic, advocates);
- community leaders;
- individuals in the mental health, nonprofit and/or community services sector;
- foundation leaders; and
- elected officials.

Gauge the relationship and how they interact with your organization. These stakeholders can also be helpful in informing community needs or answering questions about the mental health system in the area.

### Learn About the Mental Health System (National, State, Local)

Some potential questions to research and ask stakeholders as you are learning about the mental health system include:

- 
- What are the local agencies that serve individuals with mental illness and their families? What services do they provide? What barriers exist in accessing these services?
    - What are these agencies' existing priorities?
    - How are mental health services provided for those without means to pay? For those without transportation?
    - What crisis services are provided?
  - Where are opportunities to build relationships with these entities?
  - Where are potential gaps in services and supports?

These questions can be useful in starting to gauge needs. If you are an ED at an Affiliate, reach out to your State Organization as needed for help in learning about the statewide mental health system and their advocacy efforts.

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## Getting to Know NAMI

### Attend a NAMI ED Council Meeting

NAMI National hosts monthly virtual meetings of the ED Council. These meetings provide opportunities to connect with other NAMI EDs, receive relevant updates and information from NAMI National, and ask questions. Email [fieldcapacity@nami.org](mailto:fieldcapacity@nami.org) to get added to the contact list for these meetings.

### Connect with NAMI Teams

Depending on what needs arise, get connected to the appropriate team at NAMI National to answer any questions you have related to NAMI signature programs, national advocacy, initiatives, etc. The [Introduction to NAMI for New Leaders](#)<sup>9</sup> course includes information on NAMI National teams that work with the field. If needed, your Field Capacity Building point of contact (reach out to [fieldcapacity@nami.org](mailto:fieldcapacity@nami.org)) can help make this connection.

*continued*



## Getting to Know NAMI, *continued*

### Familiarize Yourself with NAMI Systems

As a new Executive Director, you will need to create an account at [NAMI.org](https://www.nami.org) (if you don't already have one) and update your organization's information in NAMI 360. NAMI 360 is the customer relationship management (CRM) system NAMI uses to track NAMI organization information, contacts and membership. Ensure that you are listed as the Executive Director for your organization in NAMI 360. Here are some resources:

[NAMI 360 Help Center](#)<sup>10</sup>

[How to Edit Board and Staff Members](#)<sup>11</sup>

Eventually, the functions of NAMI 360 will be moved to NAMI 720. NAMI 720 is used for program listings and reporting programmatic data. Here is a resource:

[NAMI 720 Help Center](#)<sup>12</sup>

A few other resources to familiarize yourself with are the Community of Practice and NAMINet. Keep an eye out for upcoming developments to include more NAMI resources.

[NAMI Community of Practice](#)<sup>13</sup>

[NAMINet](#)<sup>14</sup>

### Connect with Other NAMI Executive Directors

Reaching out to your colleagues can provide helpful tools and resources, advice and support. As a NAMI ED, you are not alone. There are others out there to support you in your journey. There are multiple ways to connect with other EDs of NSOs and NAs:

- Join the NAMI Executive Director online [Community of Practice](#)<sup>13</sup> and post an introduction message.
- Support colleagues by commenting or answering questions on the online [Community of Practice](#)<sup>13</sup>.
- Post any questions on the [Community of Practice](#)<sup>13</sup> you have that would benefit from NAMI ED input, such as requests for sample board orientation presentations, job descriptions, etc.
- Attend a NAMI Executive Directors' Leadership Exchange (read more about this in the [six-month section](#)).
- Attend NAMI Executive Directors Council monthly meetings. Note: Meeting recordings are posted on the ED Council's Community of Practice.



### Participate in a NAMI Program

If you have not already, take part in a signature NAMI education or support program. This will give you a direct look at the programs and support NAMI offers to communities. Ideally, this program will be through your organization; however, if this is not an option, look for opportunities to attend a program through another NA or NSO. [NAMI Family and Friends](#)<sup>15</sup> is a good introductory program. Additionally, [NAMI Basics](#)<sup>16</sup> is available online.

*continued*

## Getting to Know NAMI, *continued*

### Meet with Your State Organization (if NA)

If you are an Affiliate ED, contact the ED or other leadership of your State Organization and set up a meet-and-greet. Share some information about yourself and your background.

The relationship between NSO and NA is critical to foster from the start. As a leader of an Affiliate, you are part of a larger network of local Affiliates operating in the same state, fulfilling the same mission in your communities. You will work with other Affiliate leaders and the State Organization in collaboration to improve the lives of individuals impacted by mental illness.

Learn about statewide concerns, current public policy issues, advocacy initiatives, and the role of your Affiliate in the state. Ask questions to determine what you can expect that relationship to be. For example, how will your Affiliate be expected to respond to media inquiries? What are the expectations around advocacy?

### Have an Affiliate Meeting (if NSO)

Host or attend a meeting of Affiliates in your state. Start getting to know your Affiliate leaders and building relationships. Try to gauge the following:



- What programs do Affiliates provide?
- How are they involved in advocacy at the local and state levels?
  - What are their short-term needs?
- What are their budgets and staffing structures?
- Regarding NSO/NA relationships, where are the strengths? Where are their pain points?

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#### Expanded links:

- <sup>6</sup> <https://www.joangarry.com/nonprofit-elevator-pitch-1/>
- <sup>7</sup> <https://www.dropbox.com/scl/fo/ad2g9vdxn1t9j5lw5y83d/h?dl=0&rkey=h9tbi5602zvvqpx2qju5lutr>
- <sup>8</sup> <https://www.councilofnonprofits.org/find-your-state-association>
- <sup>9</sup> <https://learning.nami.org/courses/an-introduction-to-nami-for-new-leaders/>
- <sup>10</sup> <https://help.nami.org/collection/128-nami-360>
- <sup>11</sup> <https://help.nami.org/article/180-how-do-i-view-and-edit-board-and-staff-members>
- <sup>12</sup> <https://help.nami.org/collection/258-nami-720>
- <sup>13</sup> <https://community.nami.org>
- <sup>14</sup> <https://www.nami.org/naminet>
- <sup>15</sup> <https://www.nami.org/Support-Education/NAMI-Programs/NAMI-Family-Friends>
- <sup>16</sup> <https://basics.nami.org/>



# Chapter 5: Your First Six Months

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## Getting to Know Your Role

After your first six months, you should spend some time reflecting and determining next steps. This is a good chance to think about everything you have learned and the areas where you still want to grow yourself or your organization.

### Complete Advocacy Training

Whether you are new to advocacy or a professional, take NAMI’s advocacy training, NAMI Smarts for Advocacy. NAMI Smarts for Advocacy is a training program that develops the following skills:

Telling a compelling story that is inspiring and makes an “ask” in 90 seconds.

Writing an effective email, making an elevator speech, and making an impactful phone call.

Orchestrating a successful meeting with an elected official.

These skills will be indispensable as you cultivate your relationships with leaders in your community and expand your advocacy. This training also provides the opportunity to meet individuals who are passionate about telling their story and making a difference.

## Getting to Know Your Role, *continued*

### Continue to Skill Up in Key Areas of Professional Development

Identify where you are in terms of skilling up in key professional development areas you previously identified. If you are off track, why? What can you do to get back on track? Do you need to alter some of your goals or change the timeline? If you did not previously have the opportunity to identify a couple of professional development goals, do this now, and make a plan to skill up in these areas.



## Getting to Know Your Organization

### Take Another Look at Your Governing Documents

Review your organization's governing documents, especially your bylaws. You will notice that you likely have different insight into the bylaws now that you have seen how the organization functions day to day.

Delve deeper into different areas of the bylaws. For example, you may take a closer look at how new board members are to be elected or when the board can go into executive session. Take notes and write down any questions for the board chair. What is unclear? Is there anything you may suggest rewording, adding or removing? This activity can help identify future revisions you might want to suggest to the board to make governance decisions clearer, increase accountability, and strengthen the organization overall.



## Getting to Know Your Community

### Get a Sense of Community Needs

Now is a great opportunity to get a sense of the needs of the community so your organization can help meet relevant needs. Consider doing a community needs assessment to see what needs you are meeting and where your organization can adjust. An example of a community needs assessment resource can be found [here](#)<sup>17</sup>.

## Getting to Know NAMI

### Continue Building Relationships with Other NAMI Organizations

Continue building the relationships that you've started developing so far. This includes continuing to build relationships with staff, the board, community partners, your NSO or NAs, and others with which you have been working.

*continued*

## Getting to Know NAMI, *continued*

Critical relationships to continue fostering are those with other NAMI organizations, as well as NAMI National. If you are an ED at an NSO, work with your Affiliates to strengthen your relationships with each of them. For the state's Model A or C Affiliates, building a strong relationship with the organization's Executive Director and/or Board Chair can be critical in ensuring that you are able to communicate and partner in the future. For Model B Affiliates, ensure that you are meeting with their leadership regularly, whether that be attending steering committee meetings or working with program leaders. Understanding the needs of Affiliates – and being responsive to those needs – is one of the most important duties of an NSO.



If you are an ED at an affiliate, work to strengthen the relationships that you have with your NSO as well as other Affiliates in your area.

Having open communication and good working relationships with others in your area can help you feel supported, facilitate more opportunities for your organization, and strengthen the quality of the services in your community.

If you haven't already done so, join the NAMI Executive Directors Council. The monthly council meetings provide great opportunities to network with other EDs, learn best practices, and get regular updates from NAMI.

### Learn More About NAMI Programs

It is important to have a working knowledge of the education programs NAMI offers and, most importantly, what you are offering at the state and local levels. Familiarity with programming helps you when applying for funding, building relationships, and supervising staff or volunteers.

- ✔ Attend programming that your organization (or nearby Affiliate) offers.
- ✔ Get to know more about each program and how they work.
- ✔ Get to know your program leaders and facilitators.
- ✔ Explore NAMI's website to learn about programming you might not be offering and think about how that programming might fit into the existing plan for your organization.

There are a variety of resources useful to new EDs on the [EduHelpDesk](#)<sup>18</sup> located on NAMINet, including:

- [NAMI Education Program Operating Policies](#)<sup>19</sup>
- [NAMI Programs Book](#)<sup>20</sup>

### Review NAMI Marketing and Communication Guidance

Review the marketing and communications guidance NAMI provides for NAMI State Organizations and Affiliates. This will guide how you communicate with members, stakeholders in the community, media and others while helping you craft your messaging. This includes the [NAMI identity guide](#)<sup>21</sup>, which outlines the basic ways in which NAMI approaches both the content and design of our publicly facing materials and messaging.

*continued*

## Getting to Know NAMI, *continued*

### Learn and Network Through NAMI Leader Events

Attend any events, such as NAMIcon, NAMI Alliance Day or the Executive Directors' Leadership Exchange (EDLE) to learn from others in NAMI about best practices and lessons learned. Review [Executive Directors' Leadership Exchange](#)<sup>22</sup> and [NAMI Alliance Day](#)<sup>23</sup> content from past years on NAMINet.

EDLE is an annual conference hosted by EDs, for EDs. The programming is meant to support EDs as they grow in their roles. Previous EDLEs have covered areas such as capacity-building, diversity and inclusion, fundraising, marketing, policy, and other subjects of interest to the NAMI Alliance.

NAMI Alliance Day precedes NAMI's annual convention and is designed specifically for NSOs and NAs. Presented and developed by NAMI National's Alliance Relations Department, this day is dedicated to supporting the great work taking place within the NAMI Alliance and providing programming, tools and resources on myriad topics that help diverse NAMI organizations build capacity.

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#### Expanded links:

<sup>17</sup> <https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources>

<sup>18</sup> <https://www.nami.org/NAMInet/Education/EduHelpDesk>

<sup>19</sup> <https://www.nami.org/NAMI/media/Extranet-Education/2019-NEP-Operating-Policies-FINAL.pdf>

<sup>20</sup> <https://www.nami.org/NAMI/media/Extranet-Education/2019-NEP-Programs-Book.docx>

<sup>21</sup> <https://www.nami.org/Extranet/NAMI-State-Organization-and-NAMI-Affiliate-Leaders/NAMI-Marketing/NAMI-Identity-Guide>

<sup>22</sup> <https://www.nami.org/NAMInet/Operations-Governance/Executive-Directors-Leadership-Exchange>

<sup>23</sup> <https://www.nami.org/NAMInet/Operations-Governance/NAMI-Alliance-Day-2022>





# Chapter 6: Your First Year

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## Getting to Know Your Role

### Continue Professional Development

Professional development is an ongoing, vital part of your work. To be the best leader you can be means continuing to build on your skillset. Despite how hard it may be to make time for professional development, it is important to focus on growing as a leader. This will set a good example for your staff, build your capacity to lead, and strengthen your organization.

Over the past year, have you identified areas you would like to skill up in? What avenues are there for you to explore those areas? Don't forget about leveraging free and low-cost options and local opportunities, and reaching out to your NAMI Field Capacity Building point of contact or leaders from other NAMI organizations for resources on specific areas.

Encourage your staff and/or board to also engage in professional development, and consider what systems you can put in place to support their professional development goals. How can you facilitate their growth?





## Getting to Know Your Role, *continued*

### Consider Succession-Planning

It is never too early to set your organization up for success. A good succession plan accounts for emergency and planned departures, no matter when they may occur. This will help ensure a smooth leadership transition and a sense of stability for current staff members who are continuing the work of the organization even while transitions take place. Engage your board in conversations around planning for your departure or other leadership transitions within your organization and at the board level. Explain the importance of having these conversations early and often.

## Getting to Know Your Organization

### Continue Building Relationships

You should continue to learn about your NAMI organization as you continue to grow in your position as ED. Continue building the relationships that you started developing in your first year. This includes continuing to build relationships with staff, the board, and others with whom you have been working.

If you are an ED at an NSO, work with your Affiliates to strengthen your relationships with each of them. For Model A or C Affiliates, building a strong relationship with the organization's Executive Director or Board Chair can be critical in ensuring that you are able to communicate and partner in the future. For Model B Affiliates, ensure that you are meeting with their leadership regularly, whether that be attending steering committee meetings or working with program leaders. Understanding the needs of Affiliates – and being responsive to those needs – is one of the most important duties of a NAMI State Organization.



If you are an ED at an NA, work to strengthen the relationships that you have with your State Organization, as well as other Affiliates in your area. These relationships can help support you in the future. Having open communication and good working relationships with others in your area can help you feel supported, facilitate more opportunities for your organization, and strengthen the quality of the services in your community.

### Review Important Documents Again

Revisit important documents that you reviewed at the **beginning of your journey** as Executive Director. You will notice that after having been at NAMI for a year, you may have a new perspective on each of the documents.

*continued*

## Getting to Know Your Organization, *continued*

### Staffing/HR Documents

Does your organization have all of the policies and procedures in place to ensure the success of your organization? Is anything missing? Does your organization chart make sense?

- Employee handbook and accompanying policies and procedures
- Job descriptions
- Organizational chart

### The organization's Strategic Plan or Action Plan (if applicable)

Does this need to be revised or revisited? What have you accomplished from your plan in the past year? Have you been able to operationalize your plan? Who had a hand in developing it? How was input gathered and integrated into the plan? If your organization does not have a strategic plan or action plan, can you engage the board and/or staff to create one?

### Organizational Bylaws

Do they need to be reviewed or revised? Does the organization act in accordance with the bylaws?

### Charter (NSO) or Affiliate Agreement (NA)

Does the organization act in accordance with its charter or Affiliate agreement? Are there changes that need to be made to ensure that you meet your responsibilities as an NSO or NA?

### Fundraising or Fund -Development Plan

What does your fund-development plan look like? Does it meet your organization's current needs? If you do not have one, consider creating one.

### Marketing and Communications Plan

What does your plan for marketing and communications look like? Does it still meet your organization's needs? If you do not have one, consider creating one.

### Any Operations Plan

Does your current plan meet the needs of your organization? Do you need to reevaluate? If you do not have an operations plan to dictate the day-to-day work, consider creating one.

### Reflect on Your Organization's Board

Consider completing a board matrix to get a sense of what skills and experiences are represented on your board and where opportunities for recruitment may exist. A board matrix lists different skills, competencies, and backgrounds you need or want represented on your board. Find a sample board matrix [here](#)<sup>24</sup>.



- Whom can you count on to lead committees, help make connections, set up events, etc.?
- Are there individuals who are not actively contributing who may need to transition out?
  - Who are the champions on your board?
- Is your board missing anything? Do you have positions to fill or unmet needs?
- If the organization has term limits, who is rolling off the board within a year, and are there any gaps in skills/expertise that this will create?

Make a plan to work with your board to recruit for any needed skillsets identified through the board matrix exercise.

*continued*

## Getting to Know Your Organization, *continued*

This is also a good time to reflect on how the board functions and where there may be opportunities:



- Does the structure of board meetings result in important decision-making? Is critical work being accomplished during these meetings?
  - Are board members engaged? Are there critical areas where they are not engaged? Consider sharing a “mission moment” at each board meeting to highlight one of your programs, advocates, good work of a board member, or subject areas the board will find interesting and applicable to the work they are doing.
  - Are you keeping the board in the know often enough and with any important details and developments? Do you need to adjust what communication with the board looks like?
- Are board committees functioning well? Do they have clear goals/charges? Are there sufficient committees to do the work, not enough, or too much that board members are spread thin?
  - How is your executive committee (usually the board officers and the ED)? Does the executive committee meet regularly to address issues that may arise between board meetings?

There are many resources available around board governance and the ED/board relationship that may be helpful to new EDs. BoardSource and Joan Garry, included in the resource list of this toolkit, offer a wealth of information on working with boards.

### Reflect on Your Staffing



- Is your staffing adequate?
- Are there key positions that are missing? What is needed to fill these positions?
  - Are there changes that need to be made to better meet your organization’s objectives?
- How is your level of staff turnover?
- How is employee morale?

If there are challenges or needs in any of these areas, plan to address them.

### Reflect on the Past Year

It is important to take time to reflect on the past year as a whole. Consider such things as what went well in the last year and what didn’t, how successful you’ve been in your new position, and your organization’s growth and where it needs to continue to grow. Reflect on everything you’ve accomplished, any lessons you’ve learned, and where you’d like to go moving forward.

## Getting to Know Your Community

### Continue Building Relationships with External Stakeholders

Now that you have a stable foundation and understanding of your organization, you should continue to focus on building relationships with community members and external stakeholders.

If you haven't already, now is a great time to join local coalitions, task forces or committees focusing on your organization's priority areas. Ideally, these priority areas will be based on a strategic plan, but yearly goals, conversations, and any community needs assessment can inform them if your organization is without a strategic plan. You want to think about where you need to have a seat at the table when conversations impacting your members are being had. It's important to note that depending on the number of task forces and coalitions, you won't be able to serve on all of them, so it's critical to prioritize where your voice will have the biggest impact.

### Establish Relationships with Your Local Media

While you may have already started this, now is a good time to put a concerted effort into growing relationships with the media. Your goal is to be the voice of mental health in your local community or state, which will involve both proactive (not responding to a specific event) and reactive (responding to a specific event, piece of legislation, etc.) interactions.

Check out the [PR Toolkit](#)<sup>25</sup> on NAMINet for resources on proactive and crisis (reactive) media, as well as general guidance for messaging and working with the media.

## Getting to Know NAMI

It is also important to continue to build your understanding of and relationship with NAMI National and other NAMI organizations. By this point in your onboarding, hopefully you understand who at NAMI National and other NSOs/NAs can help you with challenges you may experience, and you have built relationships with those people. In addition to serving as a support to you in your role, these relationships can contribute to your organization's development and growth. For example, there may be opportunities to partner with other NSOs and NAs on different initiatives, such as grant opportunities or advocacy. Often collaborating can result in better outcomes than if everyone worked alone.



#### Expanded links:

<sup>24</sup> <https://www.theparkmill.com/blog-posts/2012/01/12/board-matrix-template>

<sup>25</sup> <https://www.nami.org/NAMINet/Marketing-Communications/PR-Toolkit>

# Resources

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## Definitions

### Strategic Plan

Outlines strategic goals based on the organization's mission and vision, as well as the resources needed to attain them.

### Bylaws

A legal document that dictates how the organization should be governed. Organizations are legally accountable for following their bylaws.

### Succession Plan

A defined process and strategy developed to address in the event organizational leadership leaves or are unable to fulfill their role.

### Transition Plan

A detailed document that outlines important information (contacts, deadlines, projects, etc.) to better ensure a smooth leadership transition.

### Charter Agreement

Legal document between NAMI National and the NAMI State Organization (NSO) that grants the NSO its status and use to use the NAMI name and brand.

### Affiliation Agreement

Legal document between NAMI National and the NAMI Affiliate (NA) that grants the NA its status and use to use the NAMI name and brand.

### OHAS

Organizational Health Assessment Survey, a tool used by NAMI National to assess NSO and NA organizational health in 12 areas.

### NAMI 360

The customer relationship management (CRM) system NAMI uses to track NAMI organization information, contacts and membership.

### NAMI 720

A customer relationship management (CRM) system NAMI uses that is currently used for program listings and reporting programmatic data.

### ED Council

The Executive Director's Council is one of four advisory councils made up of NAMI leaders who serve at the pleasure of the NAMI National board of directors and provide guidance and support to them. The ED Council is open to all executive directors from NSOs and NAs. This council provides opportunities to network and share challenges unique to the ED role.

### NAMINet

<https://www.nami.org/naminet> houses tools relevant to leaders of NAs and NSOs on various topics, including capacity-building, membership, financial management, and more.

# Checklist: Your NAMI Organization

## Week 1

- Introduce yourself to staff.
- Review the following critical documents:
  - Bylaws
  - NAMI State Charter/Affiliate Agreement
  - Policies and Procedures
  - Strategic Plan
  - Transition Plan
  - Onboarding Plan
  - Current Contracts and Agreements
- Review financials.
- Meet key people.
- Learn about the board.

## 30 Days

- Learn the organization's history.
- Review the following:
  - Last six months of board minutes
  - Staffing/HR documents
- Conduct a risk assessment.
- Meet with staff one on one
- Learn how data is collected and managed.
- Review organization programs.

## 90 Days

- Review any fund development plan.
- Review any operations plan.
- Identify top strengths and areas to address.

## 6 Months

- Review your organization's governing documents (especially bylaws).

## 1 Year +

- Reflect on the past year.
- Revisit critical documents.

## Checklist: NAMI Generally

### Week 1

- Connect with your NAMI Field Capacity Building Point of Contact.
- Get added to ED email list.

### 30 Days

- Complete the Intro to NAMI for New Leaders course.
- Review the Roles & Responsibilities in the NAMI Alliance.
- Review the NAMI Standards of Excellence.
- Connect with your NAMI state organization (if affiliate).
- Have an affiliate meeting (if state organization).

### 90 Days

- Connect with other NAMI EDs.
- Attend an ED council meeting.
- Connect with NAMI teams as needed.
- Get to know NAMI's systems (720 & 360).
- Participate in a NAMI program.
- Meet with state organization (if affiliate).
- Have an affiliate meeting (if state organization).

### 6 Months

- Continue to build relationship with NAMI National, state organization, and affiliates
- Learn about NAMI programs
- Review content from previous NAMICons and other informational content
- Review NAMI marketing and communications guidance

### 1 Year+

- Continue to build relationship with NAMI National and other NAMI organizations
- 

## Checklist: Your Community

### 30 Days

- Assess the org's reputation in the community
- 

*continued*



## Checklist: Your Community, *continued*

### 90 Days

- Learn about the local/state/federal mental health system.
- Meet with community stakeholders.

### 6 Months

- Continue to build relationships with external stakeholders.
- Get a sense of community needs.

### 1 Year+

- Continue to build relationships with external stakeholders.
- Join coalitions and local alliances.
- Establish a relationship with local media.

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## Checklist: Executive Director Role

### Week 1

- Draft goals for your onboarding

### 30 Days

- Get your calendar in order

### 90 Days

- |   |  |
|---|--|
| <input type="checkbox"/> Complete ethics-related learning                 | <input type="checkbox"/> Connect with local nonprofit associations |
| <input type="checkbox"/> Determine your baseline competencies             | <input type="checkbox"/> Draft your elevator speech                |
| <input type="checkbox"/> Plan to get a crash course in need-to-know areas | <input type="checkbox"/> Celebrate your first win!                 |
| <input type="checkbox"/> Tap into local ED groups                         | <input type="checkbox"/> Evaluate progress toward onboarding goals |

### 6 Months

- Continue professional development
- Review previous EDLE content
- Take advocacy training

### 1 Year +

- Continue professional development
- Consider succession planning