

Recommended Time Frame

Week 1

30 Days

Your ED Role

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

- Get your calendar in order
- 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).

Your NAMI Organization

- 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.

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