“The First 90 Days”

The New NAMI Executive Director’s Guide
TABLE OF CONTENTS

Introduction ..............................................................................................................1

Chapter One: Things to Consider Before You Accept................................. 2

Chapter Two: Get Ready – Before Your First Day......................................... 3

Chapter Three: Welcome Aboard! The First 30 Days................................. 4

Chapter Four: The Second 30 Days................................................................. 5

Chapter Five: The Third 30 Days................................................................. 7

Chapter Six: The Honeymoon is Over............................................................. 8

Suggested Resources .......................................................................................... 9
INTRODUCTION

*The First 90 Days* is a guide for new Executive Director’s of NAMI state and affiliate organizations. It may also be helpful to tenured Executive Directors, especially those who have been in their position for less than one year. In either case, the information can be of valuable assistance in assuming and carrying out your role and responsibilities as a NAMI Executive Director.

By educating yourself on the many pieces of information for which you are now, or will be, responsible, your value to the organization will be greatly enhanced, and what you learn may help you avoid costly setbacks. Additionally, as a NAMI Executive Director, you are in a unique position to develop and enhance the leadership of the NAMI organization.

The first ninety days of a new job is both exciting and overwhelming. There is so much to learn, so many new faces and new people to meet. This guide has been prepared by people who have been where you are today, people who have endured and enjoyed their adventures within NAMI. We hope their experiences will be beneficial to you as you read and follow this guide.

The time divisions in the following pages are not set in stone, they are suggestions and can vary based on the NAMI organization’s situation, composition, and the styles and preferences of the individual using the guide. If this information reaches you too late for any of the sections, we encourage you to read through those sections anyway and prioritize what still needs to be done.

Not everything in this manual applies to everyone’s unique situation. We recognize that there are differences in what needs to be done based on demographics, geography, and even time of year that you are beginning your new position. Choose what applies to your situation and feel free to offer suggestions for future editions of this manual to: NAMI Executive Directors Group, c/o NAMI State Relations Dept, 2107 Wilson Blvd, Ste 300, Arlington, VA 22201.

If you have questions or need additional information any member of the NAMI Executive Directors Group Professional Development Committee or Executive Committee is happy to assist you.

We wish you every success in your new position and look forward to sharing in your endeavors with the NAMI Organization.
CHAPTER ONE: 
Things to Consider Before You Accept

You did it!! You were selected from numerous candidates for the position of Executive Director for this NAMI organization. CONGRATULATIONS!

Even in this time of excitement and new beginnings, it is also a time for thoughtful consideration and further study of your potential new employment. Now is the time to take a hard look at what is the current situation of this particular NAMI, and to ask some pointed questions regarding your interest, skill-set, and preconceived notions of the job.

Don’t be afraid to ask for documents and materials. Your thoughtful, careful consideration of the job that lies before you should be respected and appreciated. A mismatched executive can have devastating effects on the individual and the organization.

Following are suggested steps to take before accepting the new position:

__ 1. Review the following documents to get a better understanding of the NAMI organization that is offering to hire you.
   • Articles of Incorporation
   • By-laws
   • Strategic Plan
   • Personnel Manual
   • Board minutes for the past 6 months

__ 2. You will be part of a nationwide organization. Carefully read the NAMI National mission and vision statements that have been approved by the National Board. These can be found on the NAMI website at www.nami.org, a great resource for other organizational information as well.

__ 3. Review at least three years of financial data including as many of the following that they can supply:
   • Budget
   • Year-end financial statements
   • Audits
   • Annual Reports
   • Grant reports
   • IRS Documents tax filings and forms 990

__ 4. Review general structure of the NAMI organization that will help define the scope of the position, i.e. staffing charts, volunteer structure, Board structure, etc.

If your review of the financial situation raises concern, meet with the Board Treasurer or current bookkeeper, or perhaps even the outside auditor to get your questions answered.

Remember that concerns do not necessarily mean the job is not for you. Most healthy non-profit and for-profit organizations go through times of turmoil and change. And, there are many executive directors who find great job satisfaction in turning lemons into lemonade!

You are being asked to made a big commitment and take on a lot of responsibility. This chapter is simply reminding you to look deeper into the organization and decide whether this job is right for you.
CHAPTER TWO:
Get Ready – Before Your First Day on the Job

You’ve accepted the position as the Executive Director for the NAMI organization; a new chapter in your career has begun. As you look forward to the opportunities and challenges that lie ahead, there are some steps you can be taking to smooth the transition into your new position. These important steps can help you “hit the ground running” when you step into your office on your first day.

Remember that 70% of skills development happens through experience. Although you were likely hired because of your competencies, during the first month (and beyond) you will be in a position of both teacher and student.

Following are some suggested steps to get yourself ready as you embark on your new career:

1. Review Chapter One of this guide. Anything that you did not accomplish before you accepted the position should be done now to help ground yourself for the other steps.

2. Request and review the following documents to get a better understanding of your new job:
   - List of board members and committees
   - 6 months to a year’s worth of board committee minutes
   - Organizational charts including job descriptions for all staff, and past performance evaluations
   - Organizational brochures, newsletter, and other mailings
   - Forms: membership applications, personnel forms, board reports
   - Contracts: building leases, rentals, cleaning services, maintenance
   - A summary of insurance policies

3. If you haven’t done so already, arrange for a cash audit of fiscal accounts.

4. Arrange to meet with the previous Executive Director. Be sure to have a list of questions in hand.

5. Review outstanding office keys to determine if you should have locks changed on the office doors.

6. Arrange for an announcement about your appointment in the local newspaper and in the next mailing to members.

7. Order your business cards

8. Set up an email account

9. Begin a calendar of upcoming events: Board meetings, conventions, education program training, fundraising events

10. Familiarize yourself with the location of the state NAMI office, local affiliate chapters and state geography.

11. Start a list of things you want to do during your first week on the job.

12. Complete necessary paperwork for employment and compensation transition; I-9, W-4, direct deposit information, etc.

This is an in-between period that is often overlooked as a time to prepare for the start of your new job. The most important thing to remember is to keep in touch – your communication during this period will help set the tone of your leadership in your new role.
CHAPTER THREE:
WELCOME ABOARD! – Your First 30 Days

Sitting at your new desk, scanning new files, learning new things and meeting new people – you made it! This is when the honeymoon begins. People within the organization and the community will be anxious to meet you, and will be forming first impressions that will establish future relationships.

Following are some tasks you will want to accomplish within the first thirty days:

1. Schedule a personal conference with each staff person. Use the time to get better acquainted and find out what each has to say about the organization, their role and responsibilities, and share some things about yourself.

2. Schedule visits with key board members, committee chairs and NAMI National consumer council representative. Meet with the board leadership at their place of employment. Discuss current events within the organization, status of the relationship between the office and the board, the board and the affiliates, etc.

3. Make a personal visit to:
   - The bank officer where the NAMI accounts are held
   - Be sure to review current practices including check signing privileges
   - The outside auditor
   - Any other important financial or legal persons that have an impact on the organization

4. Continue filling out the calendar you started before and add:
   - Committee meetings
   - Community mental health coalition meetings
   - Key legislative dates
   - NAMI National conferences and conventions

5. Notify NAMI National of your arrival and contact information to establish two-way communication with the NAMI National office:
   - Contact your NAMI Regional Director
   - Establish a NAMInet account to the NAMI National intranet service
   - Subscribe to the NAMI Friday Facts email list-serve

6. If you are an affiliate executive director, contact the executive director or other leadership of your state organization and provide them your contact information.

7. With appropriate staff, board members or volunteers review the following:
   - Cash flow situation
   - Policies and procedures for accounts payable and receivable
   - NAMI web-membership status and process
   - Current grant contracts
   - Annual fund raising events and procedures
   - Staff Policies and Procedures
   - Board Policies and Procedures
   - Newsletter, website and other communications expectations and deadlines.

8. Meet with the NAMI organization’s insurance agent to review:
   - Current policies and coverage
   - Directors’ and Officers’ Liability coverage
   - Review the risk management program

The first thirty days is a good time to ask a lot of questions. You don’t have to worry about seeming unknowledgeable. However, you will establish confidence in those around you by knowing what questions to ask.
During the first thirty days we recommended that you spend much of your time learning about your new surroundings, the NAMI organization for which you are now running, including the staff, members and volunteers. Now it is time to get to know the community that the NAMI organization serves.

Following are recommendations for tasks to accomplish during your second thirty days:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Begin meeting with key leaders within the community. Take direction from your board leadership as to whom you should meet with, but be cautious about “choosing sides” or identifying to quickly with any community faction. Among those you will want to meet with are:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Mental Health Commissioner</td>
</tr>
<tr>
<td></td>
<td>• Medicaid Director</td>
</tr>
<tr>
<td></td>
<td>• Executive Director of the National Mental Health Association state/local office</td>
</tr>
<tr>
<td></td>
<td>• Leadership of any mental health consumer organizations</td>
</tr>
<tr>
<td></td>
<td>• Mental Health Coalition Chair</td>
</tr>
<tr>
<td></td>
<td>• Pharmaceutical Representatives (your Regional Director can help with contact information)</td>
</tr>
<tr>
<td></td>
<td>• Any other advisory groups</td>
</tr>
<tr>
<td><strong>2.</strong> Arrange to meet with key staff at foundations, United Way, or other significant funding sources for your organization.</td>
<td></td>
</tr>
<tr>
<td><strong>3.</strong> Join your local NAMI affiliate. Get to know members of the organization. Consider enrolling in the next education program offered at your affiliate.</td>
<td></td>
</tr>
<tr>
<td><strong>4.</strong> Visit the major newspaper(s) to meet and establish a relationship with the editor and/or staff that handle health/mental health issues. Contact your regional director for consultation if needed. It is important to meet these people BEFORE you need them!</td>
<td></td>
</tr>
<tr>
<td><strong>5.</strong> Contact other media including: television and radio.</td>
<td></td>
</tr>
<tr>
<td><strong>6.</strong> State Executive Directors, arrange to meet with local affiliates around the state. The number you visit each month will depend on the size of your state and the number of affiliates you have, however, this should be a top priority for establishing a relationship with your members. Ask about communications between the levels of the organization, listen to concerns, get to know the members and share your expectations. Be careful to avoid making premature promises for change.</td>
<td></td>
</tr>
<tr>
<td><strong>7.</strong> If you are a local affiliate executive director, arrange for a visit to your state organization. Learn about statewide concerns, current public policy issues, and the role of your affiliate organization in statewide affairs</td>
<td></td>
</tr>
<tr>
<td><strong>8.</strong> With staff and appropriate volunteers, review annual giving campaigns and fundraising events. Learn who the major donors are and campaign leaders Master the campaign structure Review donor records</td>
<td></td>
</tr>
</tbody>
</table>
9. Review programs with staff.
   • Make sure you understand each program offered.
   • Find out where the programs are offered.
   • Review program budgets and how they are subsidized.
   • How are programs evaluated?
   • Review current reports.
   • How are programs marketed?
   • What programs are future program plans?

10. Review Helpline/telephone operations. Are you satisfied with the way callers are being directed? Is there a training need?

11. With staff and/or volunteers review membership trends.
   • Where is there growth? Decline?
   • What are membership rates?
   • How are renewals handled?
   • How adequate are membership records and reports?

12. If you haven't already done so, review recent NAMI National communications and documentation including:
   • By-laws
   • Strategic plan
   • Leadership News newsletter
   • Advocate newsletter
   • Website: www.nami.org
   • Make sure you are receiving the NAMI National Friday Facts e-mail

13. Contact your Regional Director to find out when the next “New Executive Director Orientation” is scheduled for.

   During this time you’re still the “new director”, but your staff, board and the community are getting used to your style. You should feel you have mastered some of the “nuts and bolts” of the organization and your “to-do” list is sure to be growing! Remember to call on the Executive Directors group representatives and your Regional Director for more information or explanation of things that are still unclear.
CHAPTER FIVE:
Your Third Thirty Days

Your new job isn’t all that new anymore. After a couple of months you have learned a great deal, but will continue over the next year. In this thirty day period there is still some detailed reviewing to be done, however, it is time to move into planning, establishing priorities, and communicating them with others around you. You will likely have had a board meeting in these first ninety days, an important step in establishing your relationship with the leadership and staff of the organization.

Following are some suggestions for this next thirty days:

1. State Executive Directors should continue to visit with affiliate chapters. Concentrate on meeting with the staff and/or officers of the affiliates. Ask about historical relationships and “turf” issues.

2. Review vendors and supplies including printing, office supplies, telephone services, etc.

3. With the assistance of your Regional Director, (or state office for local affiliate Executive Directors) arrange an on-site visit to a comparable NAMI state or affiliate office. Plan to meet with the Executive Director and President of that organization.

4. Utilizing your organizations current strategic plan and the knowledge you’ve gained through your extensive review process, begin a process of planning and development for the organization.

5. Organize your work by means of checklists and “tickler” files. Break big tasks into smaller ones; create action lists to complete tasks and delegate or negotiate smaller tasks.

6. Review the NAMI Affiliate Toolkit

7. Determine who the key public policy and advocacy board members and volunteers are to begin mapping and developing plans.

This is a critical stage in your new role, an opportunity to demonstrate to leadership, staff and members that you understand what is going on and you have a plan. You’ve read and studied a lot of detail, now is the time to grasp the big picture and provide guidance and motivation to everyone associated or interested in the NAMI mission.
CHAPTER SIX:  
The Honeymoon is Over

After just three short months you’re expected to know the basic operations, the most pressing challenges, and the where the greatest opportunities are within the NAMI organization you are now directing.

There will be surprises and you will continue to learn new things as the year unfolds. We close this manual with some thoughts and words of wisdom from those that have gone before you:

- **DON'T BECOME DESKBOUND.** There is a lot of desk-work associated with the administration of a NAMI organization. If you’re not careful you may find yourself becoming isolated from colleagues, members, and the community. Make sure your time is balanced between office work and community appearances.

- **NOURISH YOUR PERSONAL LIFE.** There is more to life than work. Make time for your family and outside interests. Arrange for quiet time, meditation, reflection, devotion and creative thinking.

- **YOU ARE NOT ALONE!** Seek out your colleagues from other NAMI organizations. There is no need for any of us to be isolated – our work is built on a sense of family and shared vision. Your counterparts want to see you succeed and are here to help.

- **LOCAL AFFILIATES ARE THE LIFE BLOOD OF OUR ORGANIZATION.** The state NAMI is only as strong as its local affiliates. Nurture and support your local affiliates; that is where most of your leaders are recruited and developed.

- **DELEGATE as much as you can.** Get your staff and volunteers involved in setting goals and determining the work process to get there. Share and celebrate successes and examine failures together.

- **STAY FOCUSED ON GETTING TO KNOW AND UNDERSTANDING THE ORGANIZATION.** You will soon find that there is more to do than can humanly be accomplished. And, everyone has expectations based on their own priorities. Use this time to get grounded; don’t allow yourself to get caught up in dealing with “issues” before you develop an understanding of organization, its past and its present.

- **SEEK TO CONTROL YOUR TIME.** There will always be numerous emergencies and issues that will emerge to monopolize your time, if you let them. Make a conscious decision on how you use your time at work.

- **REMEMBER THAT YOUR JOB IS TO DEVELOP AND SUPPORT VOLUNTEER LEADERSHIP WITHIN THE ORGANIZATION.** You will never be able to do everything that needs to be done; it is only through creating and supporting a cadre of active and dedicated volunteers will our mission be accomplished.

- **EMBRACE YOUR ROLE as a leader and motivator.** Top motivators use task challenge, accomplishing something worthwhile, learning new things, friendliness and praise as ways to motivate staff and volunteers.
SUGGESTED RESOURCES:

NAMI RESOURCES:

NAMI Executive Directors Resource Notebook
NAMI Affiliate Toolkit
NAMI National Bylaws and Policies and Procedures
NAMInet, Internal NAMI website for members only

www.nami.org
www.boardsource.com

GENERAL NON_PROFIT RESOURCES:

Managing the Non-Profit Organization by Peter Drucker
Grassroots and Nonprofit Leadership by B. Lakey, G. Lakey, R. Napier, & J. Robinson