



**The Nation's Voice on Mental Illness**

*“The First 90 Days”*

*The New NAMI  
State Organization  
and Affiliate  
President's Guide*

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# INTRODUCTION

***The First 90 Days*** is a guide for new President's of NAMI state and affiliate organizations. It may also be helpful to tenured Presidents, 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 volunteer NAMI President.

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. Additionally, as a NAMI President, you are in a unique position to develop and enhance the leadership of the NAMI organization.

As a new President, chances are you already have a good understanding of the NAMI State Organization or Affiliate that you now preside over. Many presidents have been a member of the Board of Directors, and the organization for a few years before becoming president. Still, there are many new things to be aware of that you may not have paid attention to in your previous role.

**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.

NAMI National State Relations will send you a NAMI State Presidents Manual that includes some of the reference materials mentioned in this guide. If you do not receive yours right away contact NAMI State Relations Department at, 2107 Wilson Blvd, Ste 300, Arlington, VA 22201, [staterelations@nami.org](mailto:staterelations@nami.org).

If you have questions or need additional information contact a member of the State Presidents Council Executive Committee, NAMI State Relations staff or State Relations Board Committee.

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 Know Before You Begin Your Presidency

CONGRATULATIONS! Your NAMI Board and members have voted you into the President's seat of your NAMI organization. You have obviously proven yourself to be a capable, trustworthy and dedicated individual, and now the fun is about to begin!

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 Board presidency.

In the early weeks you will need to become increasingly aware of specific documents and materials that pertain to this NAMI organization. Your thoughtful, careful consideration of this information should priority. You will likely be calling on the immediate past-president, executive director and NAMI State and National staff to help you decipher and understand what implications some of this information has on your organization.

Following are suggested steps to take immediately after accepting the volunteer Presidents position on the Board (some of these things you may have previous knowledge of from your board experience, but it is a good idea to know where they are located in your NAMI office, or to obtain them from the past-president:

<p>_____ 1. Review the following documents to get a better understanding of the NAMI organization that you are presiding over:.</p> <ul style="list-style-type: none"> <li>• Articles of Incorporation</li> <li>• By-laws</li> <li>• Strategic Plan</li> <li>• NAMI National State Presidents' Manual</li> <li>• Board minutes for the past 6 months</li> <li>• _____ 2. You are part of a nationwide organization. Review the NAMI National mission and vision statements that have been approved by the National Board. These can be found on the NAMI website at <a href="http://www.nami.org">www.nami.org</a>, a great resource for other organizational information as well.</li> <li>_____ 3. Review at least three years of financial data including as many of the following that they can supply:             <ul style="list-style-type: none"> <li>• Budget</li> <li>• Year-end financial statements</li> <li>• Audits</li> <li>• Annual Reports</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Grant reports</li> <li>• IRS Documents tax filings and forms 990</li> <li>• _____ 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.</li> <li>_____. Review and understand the NAMI National advisory council structure and roles including State Presidents' Council, Executive Directors Group, and National Consumer Council, and Veteran's Council. Information on this can be found in your State Presidents' Manual. 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. 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 to ensure a smooth transition.</li> </ul>
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## CHAPTER TWO: Get Ready – Before Your First Board Meeting

You've taken on the President's role for the NAMI organization; a new chapter in your NAMI 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 sit at your first board meeting.

Following are some suggested steps to help you prepare for your new, and more visible, role within NAMI:

\_\_\_\_\_ 1. Review Chapter One of this guide. Anything that you did not accomplish before your term began 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 role:

- List of board members, committees, and committee assignments
- Organizational brochures, newsletter, and other mailings
- Board reports
- Contracts: building leases, rentals, cleaning services, maintenance
- A summary of insurance policies

\_\_\_\_\_ 3. Arrange a meeting with the immediate past president to pass on vital documents and information that pertains to your new role.

\_\_\_\_\_ 4. Arrange to meet with the Executive Director. Be sure to have a list of questions in hand that may include inquiries regarding:

- Communication preferences between ED and President
- ED job description, performance review process and salary history
- Meeting you are expected to attend
- Board meeting logistics and preparation
- Financial operations
- Staff structure
- Current issues you should be aware of

\_\_\_\_\_ 5. Obtain an office key and security code if necessary.

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

\_\_\_\_\_ 7. Order business cards

\_\_\_\_\_ 8. Set up a NAMI email account, if you don't already have one

\_\_\_\_\_ 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 and local affiliates

This is a good time to begin forging a professional relationship with your state or local affiliate Executive Director. This person will be key to your success as the Board President. 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: On Your Mark, Get Set, Go! - Your First 30 Days

As the new President for your NAMI organization, people within the organization and the community will be anxious to meet you, and will be forming first impressions, and expectation of your term as president that will impact future relationships.

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

<p>_____ 1. Work with the Executive Director to arrange an introduction to office staff and volunteers. 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.</p> <p>_____ 2. Personally contact key board members, committee chairs and NAMI National Consumer Council representative and Veteran’s Council representative. Discuss current events within the organization, status of the relationship between the office and the board, the board and the affiliates, etc.</p> <p>_____ 3. Review the organization’s strategic or operational plan. If none exists work with your Executive Director and/or regional director to conduct a planning retreat. While reviewing the plan consider the following:</p> <ul style="list-style-type: none"> <li>• When was the last the Board reviewed/ revised the plan?</li> <li>• Does the plan need updating?</li> <li>• Does the plan fit within the current NAMI National mission and strategic plan?</li> </ul> <p>_____ 4. Continue filling out the calendar you started before and add:</p> <ul style="list-style-type: none"> <li>• Committee meetings</li> <li>• Community mental health coalition meetings</li> <li>• Key legislative dates</li> <li>• NAMI National conferences and conventions</li> </ul>	<p>_____ 5. Notify NAMI National of your arrival and contact information to establish and familiarize two-way communication with the NAMI National office:</p> <ul style="list-style-type: none"> <li>• Contact your NAMI Regional Director</li> <li>• Establish a NAMInet account to the NAMI National intranet service</li> <li>• Subscribe to the NAMI Friday Facts email list-serve</li> <li>• Receive Leadership News newsletter</li> <li>• Receive State Presidents’ Council Manual</li> </ul> <p>_____ 6. If you are a new affiliate President director, contact the executive director or other leadership of your state organization and provide them your contact information.</p> <p>_____ 7. With appropriate staff, board members or volunteers review the following:</p> <ul style="list-style-type: none"> <li>• Cash flow situation</li> <li>• Policies and procedures for accounts payable and receivable</li> <li>• NAMI web-membership status and process</li> <li>• Current grant contracts</li> <li>• Annual fund raising events and procedures</li> <li>• Staff Policies and Procedures</li> <li>• Board Policies and Procedures</li> <li>• Newsletter, website and other communications expectations and deadlines.</li> <li>• Directors’ and Officers’ Liability coverage</li> <li>• Review the risk management program</li> </ul>
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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.

## CHAPTER FOUR: Your Second Thirty Days

During the first thirty days we recommended that you spend much of your time learning about your role within the NAMI organization for which you are now presiding over. Now it is time to get to know the larger community that the NAMI organization serves. Following are recommendations for tasks to accomplish during your second 30 days:

\_\_\_\_\_ 1. Contact your state Board Policy Committee to learn and /or refresh your knowledge of current state policy issues and your NAMI's position on those and other key issues.

Be sure to review NAMI National's policy platforms available on [www.nami.org](http://www.nami.org) or contact NAMI's National Policy and Research Institute.

\_\_\_\_\_ 2. Begin meeting with key leaders within the community. Work with your Executive Committee and Executive Director to determine messages and strategies, be cautious about "choosing sides" or identifying too quickly with any community faction.

You will want to meet with:

- Mental Health Commissioner
- Medicaid Director
- Policy leaders including state and federal senators and representatives
- Leadership of any mental health advocacy and consumer organizations
- Mental Health Coalition Chair

\_\_\_\_\_ 3. Familiarize yourself with NAMI National documents such as:

- NAMI National by-laws
- The National Strategic Plan
- The NAMI website: [www.nami.org](http://www.nami.org)
- The State President's Council operating procedures (available on-line at [www.nami.org/leaders](http://www.nami.org/leaders))
- NAMI Campaign for the Mind of America

\_\_\_\_\_ 4. Personally contact local affiliates around the state. 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.

\_\_\_\_\_ 5. If you are a local affiliate president, 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

\_\_\_\_\_ 6. With staff and appropriate volunteers, review annual giving campaigns and fundraising events. Learn who the major donors are and campaign leaders  
Learn the campaign structure

\_\_\_\_\_ 7. Review organizational programs

- Make sure you understand each program offered.
- Review program budgets and how they are subsidized
- What are future program plans?

\_\_\_\_\_ 8. Review membership trends.

- Where is there growth? Decline?
  - What are membership rates?
- How adequate are membership records and reports?

\_\_\_\_\_ 9. Consider a “President’s Column” in your state or local newsletter to maintain communication with the affiliate leaders.

\_\_\_\_\_ 10. Review Helpline/telephone operations.

\_\_\_\_\_ 11. Contact your Regional Director to find out when the next “New President Orientation” is scheduled for.

\_\_\_\_\_ 12. Contact your Board Policy/Advocacy Committee

Remember to call on State Presidents’ Council Executive Committee, your Regional Director and/or the State Relations National Board Committee for more information or explanation of things that are still unclear.

## CHAPTER FIVE: Your Third Thirty Days

NAMI leaders and members are growing accustomed to your style of leadership. After a couple of months you have learned a great deal, but will continue to learn over the next year. In this thirty-day period there is still 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:

<p>_____ 1. State Presidents 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.</p> <p>_____ 2. Utilizing your organizations current strategic plan and the knowledge you’ve gained through your extensive review process, work with your Executive Director and Board to begin a process of planning and development for the organization.</p> <p>_____ 3. With your Executive Director review the NAMI affiliation and membership processes.</p> <p>_____ 4. Make plans to attend the next NAMI Leadership Institute Conference and NAMI Convention. Information can be found on-line at <a href="http://www.nami.org">www.nami.org</a>.</p>	<p>_____ 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</p> <p>_____ 6. Review the NAMI Affiliate Toolkit</p> <p>_____ 7. Determine who the key public policy and advocacy board members and volunteers are to begin mapping and developing plans.</p> <p>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 with or interested in the NAMI mission.</p>
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## CHAPTER SIX: Words from the Wise

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 presiding over.

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:

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| <ul style="list-style-type: none"><li>• <b>BALANCE YOUR TIME.</b> There is a lot of expectations and work to be done within every NAMI around the country. Make sure you maintain a balance between work, volunteer work, and personal time.</li><li>• <b>NOURISH YOUR PERSONAL LIFE.</b> There is more to life than NAMI. Make time for your family and outside interests. Arrange for quiet time, meditation, reflection, devotion and creative thinking.</li><li>• <b>YOU ARE NOT ALONE!</b> 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.</li><li>• <b>LOCAL AFFILIATES ARE THE LIFE BLOOD OF OUR ORGANIZATION.</b> The state NAMI is only as strong as its local affiliates. Nurture and support your local affiliates; that is where most of our leaders are recruited and developed.</li><li>• <b>WORK TOGETHER</b> Share and celebrate successes and examine failures together with the staff and board of the organization.</li></ul> | <ul style="list-style-type: none"><li>• <b>STAY FOCUSED ON GETTING TO KNOW AND UNDERSTANDING THE ORGANIZATION.</b> 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 organizational politics before you develop an understanding of the organization, its past and its present.</li><li>• <b>SEEK TO CONTROL YOUR TIME.</b> 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 as a Board president.</li><li>• <b>REMEMBER THAT YOUR JOB IS TO DEVELOP AND SUPPORT VOLUNTEER LEADERSHIP WITHIN THE ORGANIZATION.</b> 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.</li><li>• <b>EMBRACE YOUR ROLE</b> 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.</li></ul> |
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## SUGGESTED RESOURCES

NAMI Presidents' Resource Notebook:  
NAMI State Presidents' Council Operating Procedures

NAMI Affiliate Toolkit

NAMI National Bylaws and Policies and Procedures

NAMI National Strategic Plan

NAMInet, Internal NAMI website for members only

[www.nami.org](http://www.nami.org)

[www.nami.org/leaders](http://www.nami.org/leaders)

[www.boardsource.com](http://www.boardsource.com)

Grassroots and Nonprofit Leadership by B. Lakey, G. Lakey, R. Napier, & J. Robinson