



# ***“The First 90 Days”***

## ***The New NAMI State Consumer Council Representative Guide***

**A publication of the  
NAMI Consumer Council and  
NAMI National Center for Leadership Development**

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# INTRODUCTION

*The First 90 Days* is a guide for new Consumer Council Representatives of NAMI state and affiliate organizations. It may also be helpful to tenured Consumer Council Representatives. The information can be of valuable assistance in assuming and carrying out your role and responsibilities as a volunteer leader as your state or local Consumer Council Rep.

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 Consumer Council Representative, you are in a unique position to develop and enhance the leadership of the NAMI organization.

As a new Consumer Council Representative, you may have a good understanding of the NAMI State Organization or Affiliate that you now represent. Many NAMI Consumer Council Representatives have been a member of the state or local Board of Directors, and the NAMI organization for a few years before becoming a Consumer Council Representative. Still, there are many new things to be aware of that you may not have known to have looked at or have fully understood the value of or reason to look at.

**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.

The NAMI National Consumer Council through the NAMI Center for Leadership Development will send you a NAMI National Consumer Council Manual, other supporting documents and articles that you may need which are mentioned in this guide. If you do not receive them right away please contact the NAMI Center for Leadership Development Team at, 2107 Wilson Blvd, Ste 300, Arlington, VA 22201, [cld\\_team@nami.org](mailto:cld_team@nami.org).

If you have questions or need additional information contact a member of the NAMI Consumer Council Executive Committee, your NAMI Regional Leadership Consultant or NAMI Center for Leadership Development staff.

The NAMI National Consumer Council strongly encourages NAMI Consumer Council Representatives and Alternates to fully participate in and through their state NAMI organizations as state and local leaders. The voice of the NAMI Consumer Movement is an important one. We often see answers that are only available to NAMI because of the life situations that we have experienced. The NAMI National Consumer Council Executive Committee wishes 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 as Consumer Council Representative

CONGRATULATIONS! You have been selected as the Consumer Council Representative for your NAMI organization. Consumer Council Representatives and Alternates are selected in many ways. Many are voted into this position by their peers, some are appointed by the state or local NAMI President and some are elected or appointed by a state or local affiliate NAMI Board. 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 the current situation of your particular NAMI organization, what time you have to dedicate to this position, what you hope to accomplish and how your particular skill set and interests can help the organization.

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 be a priority. You will likely be calling on the immediate past-consumer council representative, the National Consumer Council Executive Committee, your state or local executive director and NAMI State and National staff to help you understand some of this information.

Following are suggested steps to take immediately after accepting the Consumer Council Representative's position. Many of the following things you may already know about, but it is a good idea to know where they are located in your NAMI office, or to obtain them from the past-consumer council representative:

<p><b>1.</b> Review the following documents to get a better understanding of the NAMI organization that you are consumer council rep for:</p> <ul style="list-style-type: none"> <li>• Articles of Incorporation &amp; By-laws</li> <li>• Strategic Plan</li> <li>• NAMI National Consumer Council Handbook</li> <li>• Board minutes for the past 6 months</li> </ul> <p><b>2.</b> 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.</p> <p><b>3.</b> Review at least two to three years of financial data including as many of the following that they can supply:</p> <ul style="list-style-type: none"> <li>• Budget</li> </ul>	<ul style="list-style-type: none"> <li>• Consumer Council Budget &amp; Expenses</li> <li>• Education Budget incl. Peer Education</li> <li>• Year-end financial statements</li> <li>• Audits</li> <li>• Annual Reports</li> <li>• Grant reports</li> <li>• IRS Documents tax filings/forms 990</li> </ul> <p><b>4.</b> Review the general structure of the NAMI organization that will help define the scope of the position, i.e. staffing charts, volunteer structure, Board structure, make sure you learn about the committee structures that are so necessary, etc.</p> <p><b>5.</b> 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 the National Consumer Council Manual.</p>
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## CHAPTER TWO: Get Ready – Before Your First Board Meeting

You've taken on the Consumer Council Representatives role for the state/local NAMI affiliate; a new chapter in your NAMI leadership experience has begun. As you look forward to the opportunities and challenges that lie ahead, here are some suggested steps you can take to smooth the transition into your new position and help prepare you to hit the ground running.

<p><b>1.</b> Arrange a meeting with the immediate past consumer council rep allowing them to pass on vital documents and information that pertains to your new role.</p> <p><b>2.</b> Arrange to meet with the President and the Executive Director. Be sure to have a list of questions in hand that may include inquiries regarding:</p> <ul style="list-style-type: none"> <li>• Communication preferences between ED and Consumer Council</li> <li>• Communication preferences between the state/local affiliate president and the Consumer Council</li> <li>• Meetings you are expected to attend</li> <li>• Board meeting logistics and preparation</li> <li>• Financial operations</li> <li>• What is paid for/what isn't how do reimbursements work</li> <li>• Staff structure</li> <li>• Current issues you should be aware of</li> <li>• Opportunity to have a consumer page or corner in the newsletter where items of interest to state consumers can be posted</li> <li>• What is it the state/local affiliate needs you to accomplish?</li> <li>• What expectations do they have that need to be communicated with you?</li> <li>• Teleconference call in numbers that may be needed</li> <li>• Find out where your area is on the state/local affiliate website, who upgrades it and when the updates are due</li> </ul> <p><b>3.</b> Become familiar with the state/local affiliate mission statement, vision statement, and any policy statements.</p>	<p><b>4.</b> Figure out how you are going to gather the NAMI Consumer voice. You can't represent what you don't know.</p> <p><b>5.</b> Have the state order business cards, make clear what info you desire on cards.</p> <p><b>6.</b> Request and review the following documents to get a better understanding of the organizational structure:</p> <ul style="list-style-type: none"> <li>• List of board members, committees, and any committee assignments</li> <li>• Organizational brochures, newsletter, and other mailings</li> <li>• Board report</li> </ul> <p><b>7.</b> Arrange for an announcement about your position in the local newspaper and in the next mailing to members. (Contact ED and state pres.)</p> <p><b>8.</b> Begin a calendar of upcoming events: Board meetings, conventions, education program training, fundraising events</p> <p><b>9.</b> Familiarize yourself with the location of the state NAMI office and local affiliates, finding out if there are any consumers there who desire to be more involved.</p> <p>This is a good time to begin forging a professional relationship with your state or local affiliate president and Executive Director. These people will be important keys to your success as Consumer Council Representative.</p> <p>The most important thing to remember is to keep in touch, with the NAMI Board, but especially with the consumers your voice represents– your communication during this period will help set the tone of your leadership in your new role.</p>
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## CHAPTER THREE: On Your Mark, Get Set, Go! - Your First 30 Days

As the new Consumer Council Representative 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 Consumer Council Representative that will impact future relationships and advocacy. Here are some tasks you will want to accomplish within the first thirty days:

<p><b>1.</b> Set up a NAMINET and NAMI email account, if you don't have one. Contact <a href="mailto:staterelations@nami.org">staterelations@nami.org</a> for assistance</p> <p><b>2.</b> Send a notification to the NAMI Consumer Council regarding your new position to establish two-way communication with the NAMI National Office and Council</p> <ul style="list-style-type: none"> <li>• Include your name, address, telephone number, fax number, and email address</li> <li>• Tell them any particular skills and/or qualifications you may have; many needs arise including needing personal stories</li> <li>• Contact your NAMI Regional Leadership Consultant</li> <li>• Subscribe to the NAMI Friday Facts email list-serve</li> </ul> <p><b>3.</b> Review the organization's strategic or operational plan. While reviewing the plan consider the following:</p> <ul style="list-style-type: none"> <li>• When was the last time the Board reviewed/revised the plan?</li> <li>• Does the plan need updating?</li> <li>• Does it include education and development for NAMI Consumers?</li> <li>• Does the plan fit within the current NAMI National mission and strategic plan?</li> </ul> <p><b>4.</b> Find out who the other consumer organizations are in your state. Try to see ways and things that you can work on together</p>	<p><b>5.</b> Find out what other advocacy organizations there are in your state with which you have overlapping needs: Examples of these might include:</p> <ul style="list-style-type: none"> <li>• Centers for Independent living</li> <li>• Protection and Advocacy</li> <li>• Disability Rights Coalitions</li> <li>• Clubhouses/IAPRSR/USPRA</li> <li>• Self-advocates Network</li> </ul> <p><b>6.</b> 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/ conventions</li> <li>• When newsletter articles/pages will be due</li> <li>• When documents for board meetings need to be prepared by to make the mailings</li> </ul> <p><b>7.</b> With appropriate staff, board members or volunteers review the following:</p> <ul style="list-style-type: none"> <li>• Cash flow situation</li> <li>• NAMI web-membership status and process</li> <li>• Current grants, ending and starting dates</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> </ul> <p><b>8.</b> There is a list of other State Consumer Council Representatives in the members area of the NAMI website</p>
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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.

Many times state and local affiliate organizations may not see how to best use a consumer council representative and their respective skills. Take the time to think how you can best help your respective NAMI organization and then make the offer. NAMI is an organization that needs many different leaders. It is your time to step up to the plate if you can assist the organization.

Following are recommendations for tasks to accomplish during your second 30 days:

<p><b>1.</b> 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. Always take the time to know what the organization you are advocating with believes and advocates for.</p> <p><b>2.</b> Be sure to review NAMI National's policy platforms available on <a href="http://www.nami.org">www.nami.org</a> or contact NAMI's National Policy and Research Institute.</p> <p><b>3.</b> Begin meeting with key leaders within the community. Work with the Executive Committee, the state/local affiliate president and the Executive Director to determine messages and strategies, be cautious about "choosing sides" or identifying to quickly with any community faction.</p> <p>You will want to be a part of meetings with:</p> <ul style="list-style-type: none"> <li>• Mental Health Commissioner</li> <li>• Medicaid Director</li> <li>• Policy leaders including state and federal senators and representatives</li> <li>• Leadership of any mental health advocacy and</li> <li>• Consumer organizations</li> <li>• Mental Health Coalition Chair</li> <li>• What programs are available for</li> </ul>	<ul style="list-style-type: none"> <li>• The Consumer Council Operating Procedures (available on-line at <a href="http://www.nami.org/leaders">www.nami.org/leaders</a>)</li> <li>• The Consumer Council Seven Charges Project</li> <li>• Joint Taskforce for Consumer Inclusion</li> <li>• Affiliate Development Toolkit</li> <li>• NAMI Campaign for the Mind of America</li> <li>• Mental Health State Planning Council</li> </ul> <p><b>4.</b> Familiarize yourself with NAMI National documents such as:</p> <ul style="list-style-type: none"> <li>• NAMI National by-laws</li> <li>• The National Strategic Plan</li> <li>• The NAMI website: <a href="http://www.nami.org">www.nami.org</a></li> </ul> <p><b>5.</b> Many Consumer Council Reps help with affiliate development, to help grow NAMI Membership. This can be done through presentations and classes.</p> <ul style="list-style-type: none"> <li>• In Our Own Voice</li> <li>• Peer 2 Peer</li> <li>• Hearts and Minds</li> <li>• NAMICARE</li> </ul> <p><b>6.</b> You may be asked to consult on a situation or problem, so take the time to get to know:</p> <ul style="list-style-type: none"> <li>• The composition of the state</li> <li>• Where the NAMI population is centered</li> </ul>
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<p>consumer and their family members</p> <ul style="list-style-type: none"> <li>• What monies are available in the budget for these programs</li> <li>• Any communication problems</li> <li>• If consumers in the state have the opportunity to use computers or teleconferencing opportunities</li> </ul> <p>7. With staff and appropriate volunteers, review annual giving campaigns and fundraising events.</p> <p>8. Learn who the major donors and campaign leaders are. Learn what a campaign is, the campaign structure and how you can best</p>	<p>9. Suggest that an annual fundraising letter based on a consumer's life (how NAMI has really helped that person) might be a great fundraising opportunity if it isn't already being pursued.</p> <p>10. Review membership trends.</p> <ul style="list-style-type: none"> <li>• Where is there growth? Decline?</li> <li>• How can you help?</li> </ul> <p>11. Consider a "Consumer Council Column" in your state or local newsletter to maintain communication with the affiliate leaders.</p> <p>12. Contact your Regional Leadership Consultant (see map attached) to find out when the next "New Consumer Council Representatives Orientation" is scheduled.</p>
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## CHAPTER FIVE: Your Third Thirty Days

NAMI Board Members, NAMI Consumers and other consumer leaders are growing accustomed to your style of leadership. You have learned a great deal, but will continue to observe and learn over the next year. In this thirty-day period it is time to move into planning, establishing priorities, and communicating them with others around you, both those inside and outside of NAMI. You will 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><b>1.</b> As State Consumer Council Representative continue to maintain contact with the NAMI Consumer Members in your state and explore ways to help you state affiliate grow its consumer membership.</p> <ul style="list-style-type: none"> <li>• If turf issues or historical problems surface, first try to talk them over with the state president or state ED seeking a way to resolve the situation.</li> </ul> <p><b>2.</b> Utilizing your organization’s current strategic plan and the knowledge you’ve gained through your extensive review process, work within the plan to accomplish what you need to do as consumer council rep.</p> <p><b>3.</b> If a line of communication between you and the board doesn’t seem to be obvious and apparent (you don’t know what the board desires you to accomplish) schedule a meeting with the state president and the state executive director and suggest ways that you can be of invaluable assistance.</p>	<p><b>4.</b> 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><b>5.</b> 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><b>6.</b> Review any state operating procedures in place for the consumer council and bring to the attention of the board and state president if anything might need to change.</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; you have a plan, you are able to work well with existing NAMI leadership and are interested in helping the NAMI organization accomplish its mission.</p> <p>You’ve read and studied a lot of detail, now is the time to provide guidance and motivation to NAMI consumers and feedback of that voice to the NAMI Board</p>
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## CHAPTER SIX: Words from the Wise

After just three short months as CC rep you're expected to know basic operations, some of the most pressing challenges, and the where the greatest opportunities are within the NAMI org.

Many Consumer Council Representatives are asked to take on multiple tasks during and after their terms of office. They are asked to lead education courses, sit in on state policy meetings, give input on issues, help bring education courses into the state, assist in grant applications, speak at consumer and family gatherings, speak at provider education trainings, etc. Try not to be overwhelmed. Here are some tips from people who have been there that will help you not just to survive, but to thrive through this exciting opportunity.

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| <ul style="list-style-type: none"> <li>• <b>BALANCE YOUR TIME.</b> There are a lot of expectations and work to be done within every NAMI. 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. Take time for your family, outside interests, 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 a list of consumer council reps by state on the NAMI website – our work is built on a sense of 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, state president 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 Consumer Council Representative.</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 that our mission will 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 National Consumer Council Handbook

NAMI National Consumer Council Operating Procedures

NAMI New Consumer Council Representatives Orientation

NAMI National Seven Charges Project

NAMI National Joint Taskforce for Consumer Inclusion

NAMI Affiliate Development 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