

## Sample Executive Director Job Plan

As Executive Director, I am the Chief Executive Officer and provide staff leadership for [organization]. I am accountable for executing Board approved priorities and policies. I have overall responsibility for the financial, programmatic and operational management of [organization] necessary to fulfill our mission, to achieve Board approved outcomes, to secure necessary resources, to ensure wise stewardship of those resources, to promote [organization] within the community, to serve the needs of our clients, and to uphold our values and the highest ethical standards in the execution of my duties.

### What success looks like:

#### *Twelve months from now:*

(Include specific objectives that align with your business and strategic plans, e.g. objectives about program outcome, quality or delivery, organizational health, revenue growth or diversification, restructuring, etc).

#### *Three years from now:*

(Include the longer-term outcomes that you are building toward through your work today. That might include a move, a new building, new programs, a new funding model, evaluation systems, etc.)

### Ongoing responsibilities:

The Executive Director is the chief staff leader of (organization). She/he is primarily responsible for defining, communicating, and executing initiatives that will realize the vision presented in the the board-approved strategic plan. She/he is ultimately responsible for leading the (organization) program as well as the day-to-day administration of all internal and back-office functions. With the Board of Directors, she/he sets goals for and creates strategic and tactical plans for funding the work as planned. The executive director makes staffing decisions and enables staff success. She/he determines the most effective operational systems needed to accomplish the (organization's) goals and objectives. She/he reports to the board of directors, and must effectively consult with the board and with internal and external constituents about the immediate-, middle-, and long-range trajectory of the (organization) and the needs of the community it serves.

### Description of Key Relationships:

- \* Clients We are in existence to serve our clients. It is my responsibility to ensure that clients are treated with respect by staff, board, volunteers and other visitors to (organization). It is my responsibility to create an effective delivery system, promised outcomes and a caring atmosphere for everyone to whom we provide services. When needed, I will ensure that

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corrective action is taken to maintain that atmosphere and to protect the charitable assets of the organization.

- \* Staff and volunteers: It is my responsibility to develop and lead a highly qualified and motivated staff, management structure and volunteer workforce, dedicated to achieving the mission of (organization). and serving clients with empathy and respect. Staff and volunteers committed to personal and professional development, working as a team and enjoying their jobs, are critical to my success. My role is to empower staff and volunteers with the training, feedback, timely information, resources and technical knowledge necessary to achieve board-mandated outcomes. I will hold staff to the highest standards while treating them with respect, fairness and dignity.
- \* Donors: Without the financial support of the community, (organization) would not survive. It is my responsibility to engage current and potential donors in the future of (organization), by building their awareness of the many ways that our organization can help fulfill their dreams, by operating ethically and in the best interests of our donors, by ensuring the wise stewardship of donors and their generous contributions, and by providing donors with acknowledgement, information and recognition of their support in a way that builds lasting relationships between them and (organization).
- Board of Directors: My success depends on a strong partnership with the Board and individual directors to continue to build an organization that fulfills its mission and is worthy and trustworthy of community support. I seek a collegial partnership with the board in developing and implementing the vision, values and outcomes of (organization).

I welcome and expect open communications and timely feedback from the board on my performance, in accordance with previously determined outcomes as mutually set forth in this job plan. The board will instruct me through written policies adopted at board meetings, which it may change as appropriate. As long as I use any reasonable interpretation of those policy directives, I am authorized to establish all further policies, make all decisions, take all actions, establish all practices, and develop all activities not otherwise the responsibility of the Board. In turn, individual directors will respect director/staff boundaries by refraining from directing me or the staff outside of board meetings or board-designated committee meetings. In those interactions, directors will act only as advisors or volunteers to support staff efforts.

I shall communicate to the Board in a timely and sufficient manner to keep the Board informed and prepared for its own work. I shall keep the Board informed of relevant trends, anticipated media coverage (positive or adverse), material external and internal changes, particularly changes in assumptions upon which any board policy has been or is being established.

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I will bring to the board my analysis of changing situations and recommendations for enhancements, suggest corrective action in a timely manner on any actual or anticipated non-compliance with any policy of the Board allowing sufficient time for the Board to consider corrective action.

- \* Relationship with National Affiliate (to be completed if relevant)
  
- \* Other Community Stakeholders: In order for (organization) to fulfill its mission and support itself financially, it needs to be perceived as a vital provider of services to the community. I will develop informed and collegial relationships with elected officials and appropriate government employees, with civic, faith-based and community organizations, with the media, and with professional colleagues. I will be an active participant in our community on matters that have impact on the continued success of (organization).

### Personal development plan:

- I will seek out additional training on developing my professional expertise as an Executive Director, including more training on director/board relations and financial planning. I will complete the Leadership development program in our community.
- I will increase the technical expertise I need to lead the development of a strong fundraising program, including becoming a member of professional associations such as the Association of Fundraising Professionals and by attending relevant workshops and trainings.
- I will also gain expertise around local and national issues and trends relating to our mission and to our partnership with (national affiliate).

### Support plan:

- There are currently \_\_\_ FTE staff for a total personnel cost of \$\_\_\_\_. I have full authority within my budget limits to retain or reconfigure staffing as needed to meet my annual and long-term results.
- My operating budget for the coming year is \$\_\_\_\_\_.

### Allocation of Time to Priorities (first year)

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| • Donor and prospect cultivation, solicitation and stewardship | 25% |
| • Community and stakeholder outreach and engagement            | 25% |
| • Human resource management                                    | 15% |
| • Budgeting and other executive director functions             | 10% |
| • Planning and research  | 10% |
| • Board activities (not included elsewhere)                    | 15% |