

# Use a Job Plan to Manage for Success.

By Gayle L. Gifford, ACFRE

If you asked your boss or colleagues how well you are doing your job, what would they say? Would you get the same answer from everyone? Would their definitions of success match your own?

Evaluating performance is one of the most frustrating experiences in the workplace for staff and managers alike. It's not unusual for years to pass without any formal job feedback - and that extends to board members as well as Executive Directors and agency staff.

The standard job description is woefully inadequate as a measure of job performance. Why? Because the traditional job description merely lists tasks. It doesn't set overall goals or describe exactly what different levels of performance look like. The annual performance evaluation is so painful because it feels so subjective – who's standard am I being measured against?

From the classroom to the board room, performance improves when individuals can measure their work against clear and known benchmarks - created and agreed upon in advance.

So take out your dusty job description and rewrite it into a dynamic Job Plan.

## WHAT GOES INTO A JOB PLAN?

The job plan is a guiding document that explicitly describes the expectations you and others have for your performance. It outlines your top goals and objectives, identifies standards and measures for successful performance and outlines the resources and skills development you'll need to achieve them.

The basic components of a job plan are simple. They include:

- I. Job Overview
- II. Definitions of success
- III. Ongoing Responsibilities
- IV. Key Relationships
- V. Personal Development and Resource Commitment
- VI. Allocation of Time to Priorities

To illustrate how this tool works, let's see what a job plan might look like for a Director of Development.

### I. Job Overview

In this section, provide a general description of your job and how it adds value to the organization. Be brief, you'll get into more details later.

Example:

*As Director of Development, I am accountable for ensuring that our organization has the financial resources and wise stewardship necessary to achieve the strategic outcomes approved by the Board of Directors. I will also ensure we maintain the highest ethical standards for our fundraising.*

## **II. Definition of Success.**

What does success look like for your position? Yes, I'm afraid that you can't avoid committing to results. After all, what's the point of your job if it isn't to advance the mission of your organization? This section describes the outcomes (the ends), and not the effort (the means). Success should be in terms that are concrete, measurable and time bound.

In the rest of the plan, you'll describe what it will take to produce those results. In this way, the job planning process initiates a critical dialogue between you and your supervisor to negotiate expectations.

You don't need to limit yourself to 12 months. IF you are just starting a new position, you can also describe short term objectives, e.g. six months. If you are building for the future, then you can describe outcomes at one year, three years, or beyond.

Example:

*Twelve months from now, the following will have been accomplished:*

- \* *Revenues from annual and major giving will have increased by 5%*
- \* *Special events will be profitably producing revenues at a minimum income to expense ratio of \$3 for every \$1 spent*
- \* *A bequest society will be launched and ready for donor participation*
- \* *The Department Development infrastructure, including fund raising software, donor information, communications, staff training, and volunteer leadership, will be upgraded to support future growth goals.*

*Three years from now:*

- \* *Revenues from annual and major giving have increased by at least \$\_\_ million*
- \* *Revenues from grants will have grown by 20%, while at the same time, restricted funding will constitute no more than 60% of expanded organization revenues.*
- \* *Our planned giving program is securing significant donor commitments*
- \* *New income streams (e.g. cause-marketing, volunteer-led events, etc) are contributing between 5-10% of organizational revenues*
- \* *Volunteer solicitors and innovative technology are vital, valued and cost effective elements of the Development Department*
- \* *The Development Department will have the capacity needed to undertake a major capital campaign*

## **III. Brief description of ongoing responsibilities**

This is where you get to describe the effort that you put into the job ( the means), similar to what you would find in the typical job description. It honors the activities that make success possible.

Example:

*I am responsible for all planning, execution, control and evaluation of philanthropic revenue programs for this organization. This includes, but is not limited to:*

- *Securing operational and program income through annual and major giving, grants, planned giving, special events and other sources of income*
- *Hiring, training and supervising a high quality department staff*
- *Ensuring the responsible stewardship of donors and funds received*
- *Recruitment, training and management of an enthusiastic and talented team of fund development volunteers engaged at all levels in the development effort*
- *Managing and improving department technology and communications*
- *Ensuring sound short and long-term budgets and financial management*
- *Recommending necessary Board policies for the success and responsible stewardship of our philanthropic efforts*
- *Ensuring communications and integration throughout the organization*
- *Developing annual and long-range plans to meet organizational needs*

#### **IV. Key relationships**

This has to be my favorite part of a job plan (after defining success, of course). Much friction in organizations could be avoided if individuals had a clearer agreement on what they expected from each other, and what a positive working relationship looked like. This section of the plan allows you to articulate what leadership looks and feels like.

Example:

- \* *Donors: My primary relationship is with our donors. It is my responsibility to engage with donors and to build their awareness of the many ways that our organization can help fulfill donor dreams. I will act ethically and at all times in the best interests of our donors. I am committed to wise stewardship – of both our donor relationships and their financial support.*
- \* *Executive Director (ED): My success in this position depends on a strong partnership with my ED. My role is to support our ED in creating the best short and long-term growth and stewardship strategies for our organization, to support the ED in her work to build relationships with prospective and current donors, to provide support for soliciting gifts. I will also supply my ED with timely and insightful analysis of fund development activities in order for her to inform and advise the Board of Directors. The Executive Director is my supervisor and I am directly accountable to his/her for the outcomes described in this Job Plan.*
- \* *Development Department Staff: Critical to my success is the development of a highly qualified and motivated staff who experience professional growth, work as a team and enjoy their jobs. My role is to empower my staff with the training, feedback, timely information, resources and technical knowledge necessary to achieve*

*department results. I will hold staff accountable to the highest standards while treating them with respect, fairness and dignity.*

- \* *Board of Directors: A critical element in fundraising is having an organization that is worthy and trustworthy of support. This is the primary role of the Board of Directors and I will do all that is necessary to assist the Board in creating such an organization. I will work collegially with the Board to develop short and long-term plans to meet Board approved objectives and to develop policies to guide our fundraising programs.*
- \* *Leadership Volunteers (including Board members): Engaging leadership volunteers in our fundraising efforts is critical to our fundraising success. The conditions that make for successful relationships with my staff are the same conditions that will lead to success with volunteers.*
- \* *Other staff: Fundraising is most successful when all parts of the organization understand their interrelationships. I will work collegially with my program and administrative colleagues to build an integrated effort that will fulfill our organizational objectives. My colleagues will understand their role in and desire to contribute to my success and vice versa.*

#### **V. Personal Development and Resource Commitment**

Do you currently possess the knowledge and skills needed to achieve the accomplishments you outlined earlier? If not, this is the place to get your organization to commit to the professional development. You should also articulate what resources -- budget, people, equipment, etc -- that your organization has promised you.

Example:

##### *Professional Development*

- *Over the course of the next year, I will engage in professional development to secure the technical expertise needed to build a strong planned giving program.*
- *I will also gain expertise around local and national issues and trends relating to our mission*
- *I will secure my ACFRE within three years.*

##### *Resource Commitments:*

- *There are currently five people in the Development Department for a total personnel cost of \$\_\_\_\_\_. I have full authority within my budget limits to retain or reconfigure the department as needed to meet my annual and long-term results.*
- *My operating budget for the coming year is \$\_\_\_\_\_. Within that budget is funding to upgrade both the hardware and software for a donor management system and to upgrade the professional skills of myself and staff.*

#### **VI. Allocation of Time to Priorities**

Have you ever experienced a misunderstanding with your supervisor about where you should be spending most of your time? Well, this part of the Job Plan gives you an opportunity to clarify those expectations.

Example:

- *Donor and prospect cultivation, solicitation and stewardship* 45%
- *Developing outstanding volunteers and staff* 20%
- *Upgrading department management and administrative functions* 10%
- *Board activities (not included elsewhere)* 7%
- *Research, planning and development* 10%
- *Service to management team* 8%

## HOW TO DEVELOP AND USE A JOB PLAN

The Job Plan is a living, interactive document. It is a tool to negotiate a consensus on what you should be doing.

To get the ball rolling, you might write a first draft yourself. Your boss will be surprised, and most likely, impressed with your leadership. A colleague of mine described her experience using this process to apply for the job as a Human Resource Manager: *“When I was applying for a new job, I was asked to develop my own job description as part of the screening process. I remembered learning about Job Planning in a workshop you led. So, I developed a Job Plan instead of a job description - my future employers were so impressed, I got the job!”*

Your draft is the starting point for discussion with the individuals who have expectations of you. On what do you agree? Where do your expectations diverge? What can you agree to deliver? Ultimately, you’ll need to craft a document that both you and your supervisor can support. A Job Plan won’t work if it’s used to create expectations for performance that only Superman or Wonder Woman could fulfill! You have to feel confident that the plan is achievable.

At regular intervals throughout the year (no less than quarterly), you’ll want to review the document with your supervisor. Are you on target with expectations? If not, why not? If conditions have changed, it’s time to redesign and renegotiate the expectations that the original plan described. And it when it comes time for your annual review, the Job Plan should eliminate any surprises or misunderstandings about your performance. That end of the year discussion is also the time to write and agree upon your new Job Plan for the coming year.

Everyone in your organization can benefit from a Job Plan - and that includes your volunteers and even your Board members themselves.

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Gayle L. Gifford, ACFRE and her colleague Jonathan W. Howard at [Cause & Effect Inc.](#) help nonprofits from the grassroots to international create strategic change for a more just and peaceful world. With over 30 years of nonprofit experience, Cause & Effect helps nonprofit organizations with strategic planning, board development, fundraising and communications needs.

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