



Workplan Template

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Covering the period from: _____ to _____

Person's Name _____ Title _____

Supervisor _____ Title _____

Summary of the person's job:

The ?? Director is responsible for moving forward the (political/organizing/comms/data/etc) strategy of the organization. The ?? Director supervises two staff, and is responsible for overseeing their work to advance campaigns and promote member leadership development.

Areas of Work to Plan

Staff Development	Member/Leader Development	Campaign Work
Fundraising	Teamwork & Inclusion	Self-Development

Staff Development	Meet weekly with Supervisee X to discuss their campaign work and coach them through their member leaders' development
	Meet weekly with Supervisee Y to discuss



	their campaign work and coach them through their member leaders' development
	Determine external training needs of Supervisees X & Y and arrange for them to receive that training

Member/Leader Development	Meet monthly with org-wide Leaders' council to set priorities for staff & member trainings
	Update the curriculum for new member orientation in Q1.
	Conduct 2 new member orientations (one in Q 2, one in Q 4)

Campaign Work	Participate in monthly meetings of the state 1234 Coalition
	Direct and oversee Supervisee X's work on the local campaign to do ZZZZ
	Direct and oversee Supervisee Y's work on the local campaign to do 3333

Fundraising	The ??? Director will participate in crafting fundraising pitches that support the campaign work of the department.
	The ??? Director will participate in crafting fundraising pitches that support the general operations of the organization



	The ??? Director will participate in a year-end fundraising effort to increase funding from (target population of donors)
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Teamwork & Inclusion	The ??? Director runs the OOOO Team, where middle managers in the organization meet weekly to discuss internal challenges and solve problems.
	The ??? Director is on the Senior Leadership Team of the organization, and meets weekly with that Team to set & execute the organizational budget & plan.
	The ??? Director will participate in bargaining with the staff union, which has a contract expiration in July of this year.

Self-Development	The ??? Director has identified that they need to be working on disconnecting from work during non-work hours. They will be regularly shutting off their phone in the evening and on weekends.
	The ??? Director is interested in developing as a fundraiser. They have requested funding to attend a training in August, the cost of which is \$1,000. This training is pending budgetary approval.
	The ??? Director will reserve at least 2 hours every Friday afternoon per month to read or listen to a book or podcast that increases their ability to fundraise.