

ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

Planned Giving Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
57E	Planned Giving Officer I	<p>Bachelor's degree</p> <p>5+ years of progressive experience fundraising with emphasis on Planned Giving</p> <p>Supervisory experience</p> <p>Advanced knowledge of Planned Giving</p> <p>Legal/tax background</p> <p>Certified Financial Planner (CFP)</p>	<ul style="list-style-type: none"> • Creates, plans and implements marketing strategies to increase planned giving activity • Manages a portfolio of planned giving prospects and donors and provides ongoing stewardship for planned gifts • Works with planned giving and other development staff to develop strategies for giving campaigns • Works with financial advisors, Harvard Management Company, and donors 	<p>IMPACT Moderate impact on operations, resources, or University's reputation</p> <p>SCOPE Provides comprehensive consultation on planned giving for a defined group</p>	<p>RECEIVED Under General Direction: Within this job, the incumbent normally performs regular assignments using own judgment and following department / university policy, while keeping supervisor informed as necessary. Receives general guidance on new projects as to methods, procedures and desired end results. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are usually reviewed upon completion.</p> <p>GIVEN Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

NOTE:

- 1) Individual positions will typically have most, but not necessarily all, of the Duties & Responsibilities listed
- 2) Grade Recommendations based on comparative review/analysis of internal positions and external market data.
- 3) E = exempt, N = non-exempt but outside HUCTW due to job content, grade and/or a Confidential / Supervisory exclusion