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<th>Grade</th>
<th>Alumni Affairs</th>
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<th>Development</th>
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<td>55</td>
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<td>ALDEV Research Administrator</td>
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<td>56</td>
<td>-Alumni Affairs Officer I</td>
<td>-Research Officer I</td>
<td>-Stewardship Associate II</td>
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<td></td>
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<tr>
<td>57</td>
<td>-Alumni Affairs Officer II</td>
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<td>-Alumni Affairs Management II</td>
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| 56E   | Alumni Affairs Officer I | Bachelor’s degree 3+ years experience in Alumni Affairs | • Provides guidance to local and international alumni clubs and/or boards  
• Recruits and maintains close relations with alumni volunteers and/or board members  
• Liaison between alumni and the university wide Harvard Alumni Association  
• Develops strategy for providing admission recruitment activities, orientation support and career development information to alumni  
• Manages publication of newsletter and other publications media; writes articles  
• Builds relationships with alumni and faculty - used for information gathering for boards and committees, program development and to get participants for professional connections with students | IMPACT  
Some impact on operations, resources, or University's reputation  
SCOPE  
Provides management with comprehensive Alumni Affairs knowledge and program insight | 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.  
GIVEN  
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| 57E   | Alumni Affairs Officer II | Bachelor’s degree 5+ years of progressive experience in Alumni Affairs Supervisory experience Advanced knowledge of Alumni Affairs | - Develops and strengthens internal school outreach to students, Centers, Career Services Office, Executive Education, and other programs  
- Expands alumni engagement in school and alumni programs  
- Provides alumni with career resources and continuing education opportunities  
- Directs multiple national and/or international alumni committees and relations  
- Builds programs and activities which encourage faculty/alumni/student interaction; determines scope, content and audience  
- Works closely with fundraising staff to develop and cultivation alumni support  
- Develops new technologies to support local and international reunion/club activities  
- Develops relationships with key alumni and alumni leaders worldwide in support of the schools strategic goals  
- Manages projects | IMPACT Moderate impact on operations, resources, or University’s reputation  
SCOPE Oversees Alumni Affairs activities for a small sized program | 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.  
GIVEN Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. | 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.  
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| 57E   | Alumni Affairs Management I | Bachelor’s degree 5+ years of progressive experience in Alumni Affairs Supervisory experience Advanced knowledge of Alumni Affairs | • Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities as they pertain to alumni participation  
• Works closely with development departments to ensure consistency in projects and programs addressing alumni donors  
• Responsible for enhancing School’s reputation and broadening alumni participation by developing, directing and managing a global alumni relations effort  
• Develops strategic operational plans for the department  
• Identifies and cultivates volunteer structure to attract, retain and stimulate alumni involvement  
• Enhances existing programs and creates new initiatives  
• Manages department budget | IMPACT Moderate impact on operations, resources, or University’s reputation  
SCOPE Oversees Alumni Affairs activities of small alumni affairs and development department or a medium sized program in a larger school | 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.  
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# Alumni Affairs and Development Job Function Guide

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<tr>
<td>58E</td>
<td>Alumni Affairs Management II</td>
<td>Bachelor’s degree 7+ years of progressive experience in Alumni Affairs Supervisory experience Advanced knowledge of Alumni Affairs</td>
<td>Responsible for alumni affairs for significant class reunions (e.g. 25th and 50th) &lt;br&gt; <em>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision)</em></td>
<td>IMPACT Significant impact on operations, resources, or University’s reputation SCOPE Oversees Alumni Affairs activities of medium alumni affairs and development department or a large sized program in a larger school</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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<td>Alumni Affairs Management III</td>
<td>Bachelor’s degree 8+ years of progressive Alumni Affairs experience Supervisory experience Advanced knowledge of Alumni Affairs</td>
<td>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision)</td>
<td>IMPACT  Substantial impact on operations, resources, or University’s reputation SCOPE Oversees Alumni Affairs activities of large alumni affairs and development department</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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</table>
| 55N   | ALDEV Research Administrator | Bachelor’s degree 2+ years Alumni Affairs and/or Development experience | • As directed and/or with guidelines, performs biographical and financial research and analysis of individuals, using the Hollis development database and outside sources and prepares reports and/or briefings for events and fundraising officers  
• Qualifies sources of support for fundraising priorities  
• Participates in projects as assigned  
• Assists fundraisers with matching school/units priorities and programs with potential donors | IMPACT  
Some impact on operations, resources, or University’s reputation  
SCOPE  
Provides management with fund raising information | 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.  
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Supervises:  
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| 56E   | ALDEV Research Officer I | Bachelor’s degree 3+ years experience in Research | • Independently researches, identifies new prospects, provides in-depth analysis and makes recommendations on course of action as well as writing briefings with little review - performs in-depth biographical and financial research and analysis of key individuals, corporations and foundations using multiple complex sources for fundraisers interpreting wealth indicators including income, assets and insider stock data  
• Prepares high level briefing materials for solicitation of top individual, foundation, and corporate prospects and donors  
• Participates in self initiated projects that have a significant impact on the fundraising effort of the school/unit  
• Defines and develops departmental policies and procedures for the research operation  
• Conceptualizes and develops proactive prospecting methodologies to support fundraising objectives; assess capabilities and willingness to give | IMPACT: Some impact on operations, resources, or University’s reputation  
SCOPE: Takes initiative in providing management with complex and critical fund raising information and high level briefings | 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.  
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| 57E   | ALDEV Research Officer II | Bachelor’s degree 5+ years of progressive experience in Research Supervisory experience Advanced knowledge of Research | • Plans and sets targeted objectives and goals integrating the work of prospect research into overall fundraising objectives  
• Analyzes campaign results and works with senior team to lay groundwork for future campaign  
• Works closely with fundraising staff to develop cultivation and solicitation strategies  
• Respected on outside as expert in particular type of fundraising  
• Travels as an active participant with fundraiser on donor calls to provide subject matter expertise during prospective donor meetings | IMPACT  
Moderate impact on operations, resources, or University’s reputation  
SCOPE  
Provides management with comprehensive expertise and program direction; primarily works with leadership giving and corporations and foundations | 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.  
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| 57E   | ALDEV Research Management I | Bachelor’s degree 5+ years of progressive experience in Research Supervisory experience Advanced knowledge of Research | • Plans and sets targeted objectives and goals integrating the work of prospect research into overall fundraising objectives  
• Analyzes campaign results and works with senior team to lay groundwork for future campaign  
• Works closely with fundraising staff to develop cultivation and solicitation strategies  
• Assists in development and documentation of policies and procedures for ongoing research  
• Responsible for quality control, improving research practices and implementing appropriate systems  
• Respected on outside as expert in particular type of fundraising  
• Travels as an active participant with fundraiser on donor calls to provide subject matter expertise during prospective donor meetings | IMPACT Moderate impact on operations, resources, or University’s reputation  
SCOPE Oversees development research activities of small alumni affairs and development department | 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.  
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| 58E   | ALDEV Research Management II | Bachelor’s degree 7+ years of progressive experience in Research | • Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities  
• Works closely with development departments to ensure consistency in projects and programs addressing donors | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE  
Oversees development research activities of medium alumni affairs and development department | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
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<td>59E ALDEV Research Management III</td>
<td>Bachelor’s degree  8+ years of progressive Alumni Affairs and/or Development  Supervisory experience  Advanced knowledge of Research</td>
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<td>IMPACT Substantial impact on operations, resources, or University’s reputation  SCOPE Oversees development research activities of large alumni affairs and development department</td>
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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

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| 55N   | Stewardship Associate I (Supervisor) | Bachelor’s degree 2+ years of Alumni Affairs and/or Development experience Supervisory experience | • Supervises support staff, students, casuals and/or temps; responsible for work product  
• Serves as technical resource and/or section supervisor  
• Reports to donors on the use of their gifts  
• Prepares gift documents and special correspondence for Dean, Assistant Deans and gift officers  
• Tracks progress of gift discussions  
• In collaboration, devise means of systematically tracking stewardship activities for top donors  
• Helps to ensure information flow between variety of offices and schools  
• Facilitates funds transfers  

*Must have bona fide supervisory duties excluding this position from the HUCTW bargaining unit; otherwise, this position is an HUCTW – Coordinator, grade 55* | IMPACT  
Some impact on operations, resources, or University’s reputation  
SCOPE  
Provides management and others in tub/unit with support and general stewardship information | 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. |

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| 56E* or 56N | Stewardship Associate II | Bachelor’s degree 3+ years experience in Alumni Affairs and/or Development | • Develops departmental policies and procedures  
• Develops and recommends communication strategies, policies and procedures to engage donors and keep them informed  
• Proactively motivates giving through creating identification and recognition programs and opportunities  
• Prepares gift acknowledgements and appeals for donors using templates and/or guidance on fund raising objectives and/or past giving history and other data stored in database | IMPACT  
Some impact on operations, resources, or University’s reputation  
SCOPE  
Provides management with comprehensive stewardship knowledge and program insight | 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.  
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| 57E   | Stewardship Associate III | Bachelor’s degree 5+ years of progressive experience in donor relations Advanced knowledge of stewardship | - Designs, plans and executes selected recognition events (e.g. leadership gifts)  
- Proposes new strategies for recognizing donors of particularly notable gifts and designs individualized stewardship strategies  
- Develops stewardship publications of a high level | IMPACT  
Moderate impact on operations, resources, or University's reputation  
SCOPE  
Takes initiative in providing management with advice on complex and critical stewardship issues; primarily works with leadership giving and corporations and foundations | 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.  
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| 57E   | Stewardship Management I | Bachelor’s degree  
5+ years of progressive experience in donor relations  
Supervisory experience  
Advanced knowledge of stewardship | • Designs, plans and executes selected recognition events  
• Proposes new strategies for recognizing donors of particularly notable gifts and designs individualized stewardship strategies  
• Develops stewardship publications of a high level  
• Manages staff involved in stewarding donors, ensuring complete and accurate records and obtaining appropriate publicity for gifts | IMPACT  
Moderate impact on operations, resources, or University’s reputation  
SCOPE  
Manages the function for a small to medium sized program. | 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.  
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| 58E   | Stewardship Management II | Bachelor’s degree  
7+ years of progressive experience in donor relations  
Management experience  
Advanced knowledge of stewardship | - Plans, implements and coordinates a university-wide donor relations program  
- Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities  
- Works closely with development departments to ensure consistency in projects and programs addressing donors | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE  
Manages the function for a medium to large sized program. | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Manages:  
Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. |  |

**NOTE:**

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

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<tbody>
<tr>
<td>59E</td>
<td>Stewardship Management III</td>
<td>Bachelor’s degree 8+ years of progressive experience in donor relations Management experience Advanced knowledge stewardship</td>
<td>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision)</td>
<td>IMPACT Substantial impact on operations, resources, or University’s reputation SCOPE Manages the function for a large to very large sized program.</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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### Development Family

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</table>
| 56E   | Development Officer I | Bachelor’s degree. 3+ years experience in development | • Produces donor profiles, identifies prospects, searches databases and drafts detailed and complex briefs  
• Works closely with and serves as liaison to donors, prospects, advisors, committees/boards and university-wide development staff  
• Recruits and manages volunteers; selects committee members  
• Manages annual fund programs including fundraising (e.g. direct mail appeals and phonathon program(s))  
• Participates in determining fundraising priorities and other strategic initiatives for the department  
• Participates in deciding on stewardship vehicles and opportunities  
• Cultivates and manages relationships with international study centers across the University  
• Integrates programs with those of other development and alumni relations departments  
• Conceptualizes and develops proactive prospecting methodologies to support fundraising objectives | IMPACT  
Some impact on operations, resources, or University’s reputation  
SCOPE  
Provides management with comprehensive development knowledge and program insight | 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.  
GIVEN  
Individual Contributor: Works independently or as part of a team to achieve results. |

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</table>
| 57E   | Development Officer II | Bachelor’s degree 5+ years of progressive experience in development Supervisory experience Advanced knowledge of development | • Recruits, manages and maintains close personal contact with high-level alumni volunteer leaders to set goals, identify prospects, and oversee gift solicitations  
• Develops prospect strategy and monitors leadership solicitation  
• Works with other development staff to strategize and implement fundraising efforts across areas (e.g. major gifts, planned giving)  
• Develops and manages comprehensive programs and strategies to maintain and increase giving  
• Establishes relationships with colleagues at peer institutions to establish benchmarks and to compare and contrast programs  
• Manages portfolio of major gift, special gift, and general gift alumni | IMPACT  
Moderate impact on operations, resources, or University’s reputation  
SCOPE  
Provides management with advanced development expertise and program direction | 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.  
GIVEN  
Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |

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</table>
| 57E   | Development Management I | Bachelor’s degree 5+ years of progressive experience in development Supervisory experience Advanced knowledge of development | - Working collaboratively with dean, faculty, colleagues, administrators and boards to develop and manage fundraising strategies and development planning (e.g. major gifts, annual giving, research, stewardship, planned giving)  
- Plans and sets targeted objectives and goals integrating the work of all departments  
- Plans, manages and accountable for establishing special programs and coordinates special events which may include alumni activities  
- Manages communication strategy including proposal development  
- Analyzes campaign results and works with senior team to lay groundwork for future campaigns  
- Works closely with fundraising staff to develop cultivation and solicitation strategies  
- Develops policies and procedures for department | IMPACT Moderate impact on operations, resources, or University’s reputation  
SCOPE Oversees small development department | 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.  
GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. |

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</table>
| 58E   | Development Management II | Bachelor’s degree 7+ years of progressive experience in development Supervisory experience Advanced knowledge of development | The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision) | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE  
Oversees medium development department | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Manages:  
Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. | 

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<tr>
<td>59E</td>
<td>Development Management III</td>
<td>Bachelor’s degree 8+ years of progressive development experience Supervisory experience Advanced knowledge of development</td>
<td>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision)</td>
<td>IMPACT Substantial impact on operations, resources, or University’s reputation SCOPE Oversees large development department</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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### Annual Giving Family

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</table>
| 56E   | Annual Giving Officer I  | Bachelor’s degree 3+ years experience in an alumni or development environment Supervisory experience | - Reporting to senior officer, maintains and expands an aggressive Annual Giving program  
- Responsible for management of development activities including identification, recruitment, solicitation and stewardship of alumni volunteers and prospects  
- Participates in design of cultivation and solicitation strategies and programs for annual giving prospects and assists in their implementation  
- Manages a portfolio of annual gift alumni  
- Manages volunteer gift committees  
- Develops and implements class-wide fundraising plans and individual prospect strategies  
- Manages phonathon program, including: setting goals, hiring and training student callers, producing phonathon cards and scripts and tracking/analyzing results  
- Manages direct mail, annual appeals and newsletters programs  
- Manages student calling program  
- Collaborates with senior management team, supervisor, major gifts, planned giving, alumni association, the reunion office, students, volunteers, donors and faculty members to further the cause of fundraising efforts for each reunion campaign  
- Prepares written materials such as annual appeals, annual report, thank you letters and financial reports | IMPACT Some impact on operations, resources, or University’s reputation  
SCOPE Responsible for designing and implementing annual fundraising programs for current and more recent classes | 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.  
GIVEN Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.  

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</table>
| 57E   | Annual Giving Management I | Bachelor’s degree 5+ years of progressive experience in an alumni or development environment Supervisory experience | • Manages multiple annual fund programs (e.g. reunion giving, phonathon, class agents, parents fund,)  
• Recruits, manages and maintains close personal contact with high-level alumni volunteer leaders to set goals, identify prospects, and oversee gift solicitations  
• Develops prospect strategy and monitors leadership solicitation  
• Works with other development staff to strategize and implement fund-raising efforts across areas (e.g. major gifts, planned giving)  
• Develops and manages comprehensive programs and strategies to maintain and increase annual giving; acquire new annual donors; and retain and upgrade existing donors  
• Establishes relationships with colleagues at peer institutions to establish benchmarks and to compare and contrast programs  
• Develops policies and procedures for department | IMPACT Moderate impact on operations, resources, or University’s reputation  
SCOPE Responsible for designing and implementing the annual fund raising program for a small school or for medium sized programs | 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.  
GIVEN  
Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. |
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<tr>
<td>58E</td>
<td>Annual Giving Management II</td>
<td>Bachelor’s degree 7+ years of progressive experience in Research Supervisory experience Advanced knowledge of annual giving</td>
<td>• Manages multiple large fund programs (e.g. high profile reunion giving; 25th or 50th) <em>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision)</em></td>
<td>IMPACT Significant impact on operations, resources, or University’s reputation SCOPE Responsible for designing and implementing the annual fund raising program for a medium school or a large program or multiple medium sized programs</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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</thead>
</table>
| 59E   | Annual Giving Management III | Bachelor’s degree  
8+ years of progressive Alumni Affairs and/or Development  
Supervisory experience  
Advanced knowledge | The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/Scope, Education/Experience, and Supervision) | IMPACT  
Substantial impact on operations, resources, or University’s reputation  
SCOPE  
Responsible for designing and implementing the annual fund raising program for a large school or a very large program or multiple large programs | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. Assures success of several programs through the direction and supervision of multiple managers. |

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<tbody>
<tr>
<td>57E</td>
<td>Major Gifts Officer I</td>
<td>Bachelor’s degree 5+ years of related experience Supervisory experience Advanced knowledge of fundraising</td>
<td>• Responsible for creating and carrying out fundraising activities for a defined portfolio  • Identifies new individual, corporate and institutional/foundation prospects  • Manages special events to involve and cultivate prospects; works with events staff to operationalize  • Recruits, coordinates and provides support to volunteers, committees and events  • Plans, coordinates, and participates in soliciting gifts  • Closely collaborates with dean and the faculty  • Produces financial reports and campaign totals  • Identifies stewardship opportunities for major donors  • Maintains existing relationships and builds new ones  • Creates and implements strategy for solicitations  • Works with donors and prospects capable of making major gifts  • Coordinates with other fund development and alumni relations staff  • Builds a comprehensive fund-raising program for assigned territory  • Utilizes committee to assist with volunteers who solicit major gifts</td>
<td>IMPACT  Moderate impact on operations, resources, or University’s reputation  SCOPE*  Generally solicits $100,000 – $500,000 range</td>
<td>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.  GIVEN  Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</td>
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* The level for these positions is a combination of the number of leads being followed, the target amounts over a particular period of time, and the territory assigned.

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</thead>
</table>
| 58E   | Major Gifts Officer II | Bachelor’s degree 7+ years of related experience Supervisory experience Advanced knowledge of fundraising | - Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities  
- Works closely with development departments to ensure consistency in projects and programs addressing donors  
- Participates in strategic gift planning for school | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE*  
Generally solicits major gifts of $500,000 – $1,000,000 range | RECEIVED  
Under Limited Direction:  
Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |
### Major Giving Family

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<tbody>
<tr>
<td>59E</td>
<td>Major Gifts Officer III</td>
<td>Bachelor’s degree 8+ years of related experience Supervisory experience Advanced knowledge of fundraising</td>
<td>The Duties and Responsibilities at this level are similar to those at the prior level. This level varies based on the other measures listed (Impact/scope, Education/Experience, and Supervision)</td>
<td>IMPACT Significant impact on operations, resources, or University’s reputation SCOPE* Solicits major gifts in the millions of dollars range</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</td>
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<tr>
<td>59E</td>
<td>Major Gifts Management I</td>
<td>Bachelor’s degree 8+ years of related experience Supervisory experience Advanced knowledge of fundraising</td>
<td>• Provides creative and strategic programming to identify donors and meet the School's needs and goals  • Personally manages a portfolio of prospects  • Responsible for securing corporate financial support for the University  • Directs and manages a team of major gift officers in the identification, cultivation, solicitation, strategizing and stewardship of major gift prospects  • Develops and accountable for meeting overall department goals and objectives for major gift cultivation and solicitation  • Develops and manages prospect strategy for the team  • Develops tracking mechanisms used to measure goals  • Provides direction, mentoring and training to major gifts staff  • Analyzes and assigns major gift areas to staff  • Works closely with other campaign directors</td>
<td>IMPACT Substantial impact on operations, resources, or University’s reputation SCOPE Manages a medium sized major gifts function; generally responsible for leadership or top donor gifts</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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### Corporate and Foundation Relations Family

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| 57E   | Corporate and Foundation Relations Officer I | Bachelor’s degree; 5+ years of progressive experience in major gifts and/or corporate and foundation giving; Supervisory experience; Advanced knowledge of Corporate and Foundation Relations | • Responsible for creating and carrying out fundraising activities for a defined portfolio of corporations and foundations  
• Identifies new corporate and institutional/foundation prospects  
• Manages special events to involve and cultivate prospects; works with events staff to operationalize  
• Plans, coordinates, and participates in soliciting gifts  
• Closely collaborates with dean and the faculty  
• Produces financial reports and campaign totals  
• Identifies stewardship opportunities for major corporate donors  
• Maintains existing relationships and builds new ones  
• Creates and implements strategy for solicitations  
• Coordinates with other fund development and alumni relations staff  
• Build a comprehensive fundraising program for assigned territory | IMPACT  
Moderate impact on operations, resources, or University’s reputation  
SCOPE  
Works with donors and prospects to solicit Corporate and Foundation gifts | 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.  
GIVEN  
Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |
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<th>Impact/Scope</th>
<th>Supervision</th>
</tr>
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</table>
| 58E   | Corporate and Foundation Relations Officer II | Bachelor’s degree  
7+ years of progressive experience in major gifts and/or corporate and foundation giving  
Supervisory experience  
Advanced knowledge of Corporate and Foundation Relations | - Responsible for creating and carrying out fundraising activities for a defined portfolio of corporations and foundations  
- Identifies new corporate and institutional/foundation prospects  
- Manages special events to involve and cultivate prospects; works with events staff to operationalize  
- Plans, coordinates, and participates in soliciting gifts  
- Closely collaborates with dean and the faculty  
- Produces financial reports and campaign totals  
- Identifies stewardship opportunities for major corporate donors  
- Maintains existing relationships and builds new ones  
- Creates and implements strategy for solicitations  
- Works with donors and prospects capable of making major gifts  
- Coordinates with other fund development and alumni relations staff  
- Builds a comprehensive fundraising program for assigned territory  
- Serves as internal consultant to senior fundraisers to develop and coordinate corporate donor relations activities  
- Works closely with development departments to ensure consistency in projects and programs addressing donors  
- Participates in strategic planning for the school | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE  
Solicits Corporate and Foundation gifts; generally at the $1 million and above level | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |
## Corporate and Foundation Relations Family

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| 59E   | Corporate and Foundation Relations Management I | Bachelor’s degree 8+ years of progressive Alumni Affairs and/or Development Supervisory experience Advanced knowledge | • Provides creative and strategic development programs to identify corporate donors and meet the School's needs and goals  
• Personally manages a portfolio of prospects  
• Responsible for securing corporate financial support for the University  
• Directs and manages a team of officers in the identification, cultivation, solicitation and stewardship of major corporations and foundations  
• Develops and is accountable for meeting overall department goals and objectives for major gift cultivation and solicitation  
• Develops and manages prospect strategy for the team  
• Develops tracking mechanisms used to measure goals  
• Provides direction, mentoring and training to staff  
• Analyzes and assigns areas of solicitation to staff  
• Works with financial advisors, Harvard Management Company, donors and campaign directors | IMPACT Substantial impact on operations, resources, or University’s reputation  
SCOPE Manages a small to medium sized Corporate and Foundation Relations function; solicits gifts of 5+ million | RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area. |

### 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
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| 57E   | Planned Giving Officer I     | Bachelor’s degree                       | • 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                                                                 | IMPACT  
Moderate impact on operations, resources, or University’s reputation  
SCOPE  
Provides comprehensive consultation on planned giving for a defined group | 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.  
GIVEN  
Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |
### ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

#### Planned Giving Family

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| 58E   | Planned Giving Officer II | Bachelor’s degree 7+ years of progressive experience in Planned Giving Supervisory experience Advanced knowledge of Planned Giving Legal/tax background Certified Financial Planner (CFP) | • Prospects, cultivates, and designs strategies for planned giving prospects  
• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities  
• Works closely with development department to ensure consistency in projects and programs addressing donors  
• Works with financial advisors, Harvard Management Company, and donors | IMPACT  
Significant impact on operations, resources, or University’s reputation  
SCOPE  
Provides comprehensive consultation on planned giving for a broad group | RECEIVED  
Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion.  
GIVEN  
Supervises:  
Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions. |
## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

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<td>59E</td>
<td>Planned Giving Management I</td>
<td>Bachelor’s degree 8+ years of progressive experience in Planned Giving Supervisory experience Advanced knowledge of Planned Giving Legal/tax background Certified Financial Planner (CFP)</td>
<td>• Works with University, School and Affiliate colleagues to promote increased planned gift activity across the University</td>
<td>IMPACT Substantial impact on operations, resources, or University’s reputation SCOPE Oversees planned giving department of medium school</td>
<td>RECEIVED Under Limited Direction: Within this job, the incumbent performs regular assignments using own judgment. Determines methods and procedures on new projects. Held accountable for end results. Responsible for determining when supervisor or others should be consulted. Incumbents have discretion to make decisions within the scope of their responsibilities. Complex assignments are occasionally reviewed upon completion. GIVEN Manages: Manages people and policies, allocates personnel and resources for given projects, full hire/fire authority, has primary responsibility for performance management and career development of employees, sets policy/standards within an area.</td>
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