

## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

Grade	Alumni Affairs	Research	Stewardship	Development	Annual Giving	Major Giving	Corporate & Foundation Relations	Planned Giving
55		ALDEV Research Administrator	-Stewardship Officer I (Supervisor)					
56	-Alumni Affairs Officer I	-Research Officer I	-Stewardship Associate II	-Development Officer I	-Annual Giving Officer I			
57	-Alumni Affairs Officer II -Alumni Affairs Management I	-Research Officer II -Research Management I	-Stewardship Associate III -Stewardship Management I	-Development Officer II -Development Management I	-Annual Giving Management I	-Major Gifts Officer I	-Corporate & Foundation Relations Officer I	-Planned Giving Officer I
58	-Alumni Affairs Management II	-Research Management II	-Stewardship Management II	-Development Management II	-Annual Giving Management II	-Major Gifts Officer II	-Corporate & Foundation Relations Officer II	-Planned Giving Officer II
59	-Alumni Affairs Management III	-Research Management III	-Stewardship Management III	-Development Management III	-Annual Giving Management III	-Major Gifts Officer III -Major Gifts Management I	-Corporate & Foundation Relations Management I	-Planned Giving Management I

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### Alumni Affairs Family

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56E	Alumni Affairs Officer I	Bachelor's degree  3+ years experience in Alumni Affairs	<ul style="list-style-type: none"> <li>• Provides guidance to local and international alumni clubs and/or boards</li> <li>• Recruits and maintains close relations with alumni volunteers and/or board members</li> <li>• Liaison between alumni and the university wide Harvard Alumni Association</li> <li>• Develops strategy for providing admission recruitment activities, orientation support and career development information to alumni</li> <li>• Manages publication of newsletter and other publications media; writes articles</li> <li>• 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</li> </ul>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with comprehensive Alumni Affairs knowledge and program insight</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Individual Contributor:</b> Works independently or as part of a team to achieve results.</p>

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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	<ul style="list-style-type: none"> <li>• Develops and strengthens internal school outreach to students, Centers, Career Services Office, Executive Education, and other programs</li> <li>• Expands alumni engagement in school and alumni programs</li> <li>• Provides alumni with career resources and continuing education opportunities</li> <li>• Directs multiple national and/or international alumni committees and relations</li> <li>• Builds programs and activities which encourage faculty/alumni/student interaction; determines scope, content and audience</li> <li>• Works closely with fundraising staff to develop and cultivation alumni support</li> <li>• Develops new technologies to support local and international reunion/club activities</li> <li>• Develops relationships with key alumni and alumni leaders worldwide in support of the schools strategic goals</li> <li>• Manages projects</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees Alumni Affairs activities for a small sized program</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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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	<ul style="list-style-type: none"> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities as they pertain to alumni participation</li> <li>• Works closely with development departments to ensure consistency in projects and programs addressing alumni donors</li> <li>• Responsible for enhancing School's reputation and broadening alumni participation by developing, directing and managing a global alumni relations effort</li> <li>• Develops strategic operational plans for the department</li> <li>• Identifies and cultivates volunteer structure to attract, retain and stimulate alumni involvement</li> <li>• Enhances existing programs and creates new initiatives</li> <li>• Manages department budget</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees Alumni Affairs activities of small alumni affairs and development department or a medium sized program in a larger school</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Manages:</b> 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.</p>

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58E	Alumni Affairs Management II	Bachelor's degree  7+ years of progressive experience in Alumni Affairs  Supervisory experience  Advanced knowledge of Alumni Affairs	<ul style="list-style-type: none"> <li>• Responsible for alumni affairs for significant class reunions (e.g. 25<sup>th</sup> and 50<sup>th</sup>)</li> </ul> <p style="color: green; font-style: italic;">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)</p>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees Alumni Affairs activities of medium alumni affairs and development department or a large sized program in a larger school</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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59E	Alumni Affairs Management III	Bachelor's degree  8+ years of progressive Alumni Affairs experience  Supervisory experience  Advanced knowledge of Alumni Affairs	<i>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)</i>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees Alumni Affairs activities of large alumni affairs and development department</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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### ALDEV Research Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
55N	ALDEV Research Administrator	Bachelor's degree  2+ years Alumni Affairs and/or Development experience	<ul style="list-style-type: none"> <li>• 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</li> <li>• Qualifies sources of support for fundraising priorities</li> <li>• Participates in projects as assigned</li> <li>• Assists fundraisers with matching school/units priorities and programs with potential donors</li> </ul> <p style="text-align: center;"><i>Must have bona fide supervisory duties excluding this position from the HUCTW bargaining unit; otherwise, this position is an HUCTW – Coordinator, grade 55</i></p>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with fund raising information</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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56E	ALDEV Research Officer I	Bachelor's degree  3+ years experience in Research	<ul style="list-style-type: none"> <li>• 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</li> <li>• Prepares high level briefing materials for solicitation of top individual, foundation, and corporate prospects and donors</li> <li>• Participates in self initiated projects that have a significant impact on the fundraising effort of the school/unit</li> <li>• Defines and develops departmental policies and procedures for the research operation</li> <li>• Conceptualizes and develops proactive prospecting methodologies to support fundraising objectives; assess capabilities and willingness to give</li> </ul>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Takes initiative in providing management with complex and critical fund raising information and high level briefings</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Individual Contributor:</b> Works independently or as part of a team to achieve results.</p>

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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	<ul style="list-style-type: none"> <li>• Plans and sets targeted objectives and goals integrating the work of prospect research into overall fundraising objectives</li> <li>• Analyzes campaign results and works with senior team to lay groundwork for future campaign</li> <li>• Works closely with fundraising staff to develop cultivation and solicitation strategies</li> <li>• Respected on outside as expert in particular type of fundraising</li> <li>• Travels as an active participant with fundraiser on donor calls to provide subject matter expertise during prospective donor meetings</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with comprehensive expertise and program direction; primarily works with leadership giving and corporations and foundations</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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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	<ul style="list-style-type: none"> <li>• Plans and sets targeted objectives and goals integrating the work of prospect research into overall fundraising objectives</li> <li>• Analyzes campaign results and works with senior team to lay groundwork for future campaign</li> <li>• Works closely with fundraising staff to develop cultivation and solicitation strategies</li> <li>• Assists in development and documentation of policies and procedures for ongoing research</li> <li>• Responsible for quality control, improving research practices and implementing appropriate systems</li> <li>• Respected on outside as expert in particular type of fundraising</li> <li>• Travels as an active participant with fundraiser on donor calls to provide subject matter expertise during prospective donor meetings</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees development research activities of small alumni affairs and development department</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Manages:</b> 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.</p>

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58E	ALDEV Research Management II	Bachelor's degree  7+ years of progressive experience in Research  Supervisory experience  Advanced knowledge of Research	<ul style="list-style-type: none"> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities</li> <li>• Works closely with development departments to ensure consistency in projects and programs addressing donors</li> </ul>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees development research activities of medium alumni affairs and development department</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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</p>

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59E	ALDEV Research Management III	Bachelor's degree  8+ years of progressive Alumni Affairs and/or Development  Supervisory experience  Advanced knowledge of Research	<i>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)</i>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees development research activities of large alumni affairs and development department</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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</p>

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55N	Stewardship Associate I  (Supervisor)	Bachelor's degree  2+ years of Alumni Affairs and/or Development experience  Supervisory experience	<ul style="list-style-type: none"> <li>• Supervises support staff, students, casuals and/or temps; responsible for work product</li> <li>• Serves as technical resource and/or section supervisor</li> <li>• Reports to donors on the use of their gifts</li> <li>• Prepares gift documents and special correspondence for Dean, Assistant Deans and gift officers</li> <li>• Tracks progress of gift discussions</li> <li>• In collaboration, devise means of systematically tracking stewardship activities for top donors</li> <li>• Helps to ensure information flow between variety of offices and schools</li> <li>• Facilitates funds transfers</li> </ul> <p><i>Must have bona fide supervisory duties excluding this position from the HUCTW bargaining unit; otherwise, this position is an HUCTW – Coordinator, grade 55</i></p>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management and others in tub/unit with support and general stewardship information</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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56E* or 56N	Stewardship Associate II	Bachelor's degree  3+ years experience in Alumni Affairs and/or Development	<ul style="list-style-type: none"> <li>• Develops departmental policies and procedures</li> <li>• Develops and recommends communication strategies, policies and procedures to engage donors and keep them informed</li> <li>• Proactively motivates giving through creating identification and recognition programs and opportunities</li> <li>• 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</li> </ul>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with comprehensive stewardship knowledge and program insight</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Individual Contributor:</b> Works independently or as part of a team to achieve results.</p>

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57E	Stewardship Associate III	Bachelor's degree  5+ years of progressive experience in donor relations  Advanced knowledge of stewardship	<ul style="list-style-type: none"> <li>• Designs, plans and executes selected recognition events (e.g. leadership gifts)</li> <li>• Proposes new strategies for recognizing donors of particularly notable gifts and designs individualized stewardship strategies</li> <li>• Develops stewardship publications of a high level</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Takes initiative in providing management with advice on complex and critical stewardship issues; primarily works with leadership giving and corporations and foundations</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
57E	Stewardship Management I	<p>Bachelor's degree</p> <p>5+ years of progressive experience in donor relations</p> <p>Supervisory experience</p> <p>Advanced knowledge of stewardship</p>	<ul style="list-style-type: none"> <li>• Designs, plans and executes selected recognition events</li> <li>• Proposes new strategies for recognizing donors of particularly notable gifts and designs individualized stewardship strategies</li> <li>• Develops stewardship publications of a high level</li> <li>• Manages staff involved in stewarding donors, ensuring complete and accurate records and obtaining appropriate publicity for gifts</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Manages the function for a small to medium sized program.</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

Stewardship Family					
Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
58E	Stewardship Management II	<p>Bachelor's degree</p> <p>7+ years of progressive experience in donor relations</p> <p>Management experience</p> <p>Advanced knowledge of stewardship</p>	<ul style="list-style-type: none"> <li>• Plans, implements and coordinates a university-wide donor relations program</li> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities</li> <li>• Works closely with development departments to ensure consistency in projects and programs addressing donors</li> </ul>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Manages the function for a medium to large sized program.</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Stewardship Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
59E	Stewardship Management III	Bachelor's degree  8+ years of progressive experience in donor relations  Management experience  Advanced knowledge stewardship	<i>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)</i>	<b>IMPACT</b> Substantial impact on operations, resources, or University's reputation  <b>SCOPE</b> Manages the function for a large to very large sized program.	<b>RECEIVED</b> <b>Under Limited Direction:</b> 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.  <b>GIVEN</b> <b>Manages:</b> 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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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Development Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
56E	Development Officer I	Bachelor's degree.  3+ years experience in development	<ul style="list-style-type: none"> <li>• Produces donor profiles, identifies prospects, searches databases and drafts detailed and complex briefs</li> <li>• Works closely with and serves as liaison to donors, prospects, advisors, committees/boards and university-wide development staff</li> <li>• Recruits and manages volunteers; selects committee members</li> <li>• Manages annual fund programs including fundraising (e.g. direct mail appeals and phonathon program(s))</li> <li>• Participates in determining fundraising priorities and other strategic initiatives for the department</li> <li>• Participates in deciding on stewardship vehicles and opportunities</li> <li>• Cultivates and manages relationships with international study centers across the University</li> <li>• Integrates programs with those of other development and alumni relations departments</li> <li>• Conceptualizes and develops proactive prospecting methodologies to support fundraising objectives</li> </ul>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with comprehensive development knowledge and program insight</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Individual Contributor:</b> Works independently or as part of a team to achieve results.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Development 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	Development Officer II	<p>Bachelor's degree</p> <p>5+ years of progressive experience in development</p> <p>Supervisory experience</p> <p>Advanced knowledge of development</p>	<ul style="list-style-type: none"> <li>• Recruits, manages and maintains close personal contact with high-level alumni volunteer leaders to set goals, identify prospects, and oversee gift solicitations</li> <li>• Develops prospect strategy and monitors leadership solicitation</li> <li>• Works with other development staff to strategize and implement fundraising efforts across areas (e.g. major gifts, planned giving)</li> <li>• Develops and manages comprehensive programs and strategies to maintain and increase giving</li> <li>• Establishes relationships with colleagues at peer institutions to establish benchmarks and to compare and contrast programs</li> <li>• Manages portfolio of major gift, special gift, and general gift alumni</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides management with advanced development expertise and program direction</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Development 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	Development Management I	<p>Bachelor's degree</p> <p>5+ years of progressive experience in development</p> <p>Supervisory experience</p> <p>Advanced knowledge of development</p>	<ul style="list-style-type: none"> <li>• 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)</li> <li>• Plans and sets targeted objectives and goals integrating the work of all departments</li> <li>• Plans, manages and accountable for establishing special programs and coordinates special events which may include alumni activities</li> <li>• Manages communication strategy including proposal development</li> <li>• Analyzes campaign results and works with senior team to lay groundwork for future campaigns</li> <li>• Works closely with fundraising staff to develop cultivation and solicitation strategies</li> <li>• Develops policies and procedures for department</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees small development department</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Development Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
58E	Development Management II	Bachelor's degree  7+ years of progressive experience in development  Supervisory experience  Advanced knowledge of development	<i>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)</i>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees medium development department</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Development Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
59E	Development Management III	<p>Bachelor's degree</p> <p>8+ years of progressive development experience</p> <p>Supervisory experience</p> <p>Advanced knowledge of development</p>	<i>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)</i>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees large development department</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Annual 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
56E	Annual Giving Officer I	Bachelor's degree  3+ years experience in an alumni or development environment  Supervisory experience	<ul style="list-style-type: none"> <li>• Reporting to senior officer, maintains and expands an aggressive Annual Giving program</li> <li>• Responsible for management of development activities including identification, recruitment, solicitation and stewardship of alumni volunteers and prospects</li> <li>• Participates in design of cultivation and solicitation strategies and programs for annual giving prospects and assists in their implementation</li> <li>• Manages a portfolio of annual gift alumni</li> <li>• Manages volunteer gift committees</li> <li>• Develops and implements class-wide fundraising plans and individual prospect strategies</li> <li>• Manages phonathon program, including: setting goals, hiring and training student callers, producing phonathon cards and scripts and tracking/analyzing results</li> <li>• Manages direct mail, annual appeals and newsletters programs</li> <li>• Manages student calling program</li> <li>• 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</li> <li>• Prepares written materials such as annual appeals, annual report, thank you letters and financial reports</li> </ul>	<p><b>IMPACT</b> Some impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Responsible for designing and implementing annual fundraising programs for current and more recent classes</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Annual 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	Annual Giving Management I	<p>Bachelor's degree</p> <p>5+ years of progressive experience in an alumni or development environment</p> <p>Supervisory experience</p>	<ul style="list-style-type: none"> <li>• Manages multiple annual fund programs (e.g. reunion giving, phonathon, class agents, parents fund.)</li> <li>• Recruits, manages and maintains close personal contact with high-level alumni volunteer leaders to set goals, identify prospects, and oversee gift solicitations</li> <li>• Develops prospect strategy and monitors leadership solicitation</li> <li>• Works with other development staff to strategize and implement fund-raising efforts across areas (e.g. major gifts, planned giving)</li> <li>• Develops and manages comprehensive programs and strategies to maintain and increase annual giving; acquire new annual donors; and retain and upgrade existing donors</li> <li>• Establishes relationships with colleagues at peer institutions to establish benchmarks and to compare and contrast programs</li> <li>• Develops policies and procedures for department</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Responsible for designing and implementing the annual fund raising program for a small school or for medium sized programs</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Annual 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
58E	Annual Giving Management II	Bachelor's degree  7+ years of progressive experience in Research  Supervisory experience  Advanced knowledge of annual giving	<ul style="list-style-type: none"> <li>• Manages multiple large fund programs (e.g. high profile reunion giving; 25<sup>th</sup> or 50<sup>th</sup>)</li> </ul> <p style="color: green; font-style: italic;">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)</p>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Responsible for designing and implementing the annual fund raising program for a medium school or a large program or multiple medium sized programs</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Annual 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
59E	Annual Giving Management III	<p>Bachelor's degree</p> <p>8+ years of progressive Alumni Affairs and/or Development</p> <p>Supervisory experience</p> <p>Advanced knowledge</p>	<i>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)</i>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Responsible for designing and implementing the annual fund raising program for a large school or a very large program or multiple large programs</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p> <p>Assures success of several programs through the direction and supervision of multiple managers.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Major 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	Major Gifts Officer I	Bachelor's degree  5+ years of related experience  Supervisory experience  Advanced knowledge of fundraising	<ul style="list-style-type: none"> <li>• Responsible for creating and carrying out fundraising activities for a defined portfolio</li> <li>• Identifies new individual, corporate and institutional/foundation prospects</li> <li>• Manages special events to involve and cultivate prospects; works with events staff to operationalize</li> <li>• Recruits, coordinates and provides support to volunteers, committees and events</li> <li>• Plans, coordinates, and participates in soliciting gifts</li> <li>• Closely collaborates with dean and the faculty</li> <li>• Produces financial reports and campaign totals</li> <li>• Identifies stewardship opportunities for major donors</li> <li>• Maintains existing relationships and builds new ones</li> <li>• Creates and implements strategy for solicitations</li> <li>• Works with donors and prospects capable of making major gifts</li> <li>• Coordinates with other fund development and alumni relations staff</li> <li>• Builds a comprehensive fund-raising program for assigned territory</li> <li>• Utilizes committee to assist with volunteers who solicit major gifts</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE*</b> Generally solicits \$100,000 – \$500,000 range</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

\* 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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### Major Giving Family

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58E	Major Gifts Officer II	Bachelor's degree  7+ years of related experience  Supervisory experience  Advanced knowledge of fundraising	<ul style="list-style-type: none"> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities</li> <li>• Works closely with development departments to ensure consistency in projects and programs addressing donors</li> <li>• Participates in strategic gift planning for school</li> </ul>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE*</b> Generally solicits major gifts of \$500,000 – \$1,000,000 range</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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### Major Giving Family

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59E	Major Gifts Officer III	Bachelor's degree  8+ years of related experience  Supervisory experience  Advanced knowledge of fundraising	<i>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)</i>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE*</b> Solicits major gifts in the millions of dollars range</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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### Major 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
59E	Major Gifts Management I	Bachelor's degree  8+ years of related experience  Supervisory experience  Advanced knowledge of fundraising	<ul style="list-style-type: none"> <li>• Provides creative and strategic programming to identify donors and meet the School's needs and goals</li> <li>• Personally manages a portfolio of prospects</li> <li>• Responsible for securing corporate financial support for the University</li> <li>• Directs and manages a team of major gift officers in the identification, cultivation, solicitation, strategizing and stewardship of major gift prospects</li> <li>• Develops and accountable for meeting overall department goals and objectives for major gift cultivation and solicitation</li> <li>• Develops and manages prospect strategy for the team</li> <li>• Develops tracking mechanisms used to measure goals</li> <li>• Provides direction, mentoring and training to major gifts staff</li> <li>• Analyzes and assigns major gift areas to staff</li> <li>• Works closely with other campaign directors</li> </ul>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Manages a medium sized major gifts function; generally responsible for leadership or top donor gifts</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Corporate and Foundation Relations 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	Corporate and Foundation Relations Officer I	<p>Bachelor's degree</p> <p>5+ years of progressive experience in major gifts and/or corporate and foundation giving</p> <p>Supervisory experience</p> <p>Advanced knowledge of Corporate and Foundation Relations</p>	<ul style="list-style-type: none"> <li>• Responsible for creating and carrying out fundraising activities for a defined portfolio of corporations and foundations</li> <li>• Identifies new corporate and institutional/foundation prospects</li> <li>• Manages special events to involve and cultivate prospects; works with events staff to operationalize</li> <li>• Plans, coordinates, and participates in soliciting gifts</li> <li>• Closely collaborates with dean and the faculty</li> <li>• Produces financial reports and campaign totals</li> <li>• Identifies stewardship opportunities for major corporate donors</li> <li>• Maintains existing relationships and builds new ones</li> <li>• Creates and implements strategy for solicitations</li> <li>• Coordinates with other fund development and alumni relations staff</li> <li>• Build a comprehensive fundraising program for assigned territory</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Works with donors and prospects to solicit Corporate and Foundation gifts</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Corporate and Foundation Relations Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
58E	Corporate and Foundation Relations Officer II	<p>Bachelor's degree</p> <p>7+ years of progressive experience in major gifts and/or corporate and foundation giving</p> <p>Supervisory experience</p> <p>Advanced knowledge of Corporate and Foundation Relations</p>	<ul style="list-style-type: none"> <li>• Responsible for creating and carrying out fundraising activities for a defined portfolio of corporations and foundations</li> <li>• Identifies new corporate and institutional/foundation prospects</li> <li>• Manages special events to involve and cultivate prospects; works with events staff to operationalize</li> <li>• Plans, coordinates, and participates in soliciting gifts</li> <li>• Closely collaborates with dean and the faculty</li> <li>• Produces financial reports and campaign totals</li> <li>• Identifies stewardship opportunities for major corporate donors</li> <li>• Maintains existing relationships and builds new ones</li> <li>• Creates and implements strategy for solicitations</li> <li>• Works with donors and prospects capable of making major gifts</li> <li>• Coordinates with other fund development and alumni relations staff</li> <li>• Builds a comprehensive fundraising program for assigned territory</li> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate corporate donor relations activities</li> <li>• Works closely with development departments to ensure consistency in projects and programs addressing donors</li> <li>• Participates in strategic planning for the school</li> </ul>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Solicits Corporate and Foundation gifts; generally at the \$1 million and above level</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

### Corporate and Foundation Relations Family

Level	Function/ Roles	Education/ Experience (Minimum Required)	Typical Duties and Responsibilities (Cumulative from level to level in each job family)	Impact/Scope	Supervision
59E	Corporate and Foundation Relations Management I	Bachelor's degree  8+ years of progressive Alumni Affairs and/or Development  Supervisory experience  Advanced knowledge	<ul style="list-style-type: none"> <li>• Provides creative and strategic development programs to identify corporate donors and meet the School's needs and goals</li> <li>• Personally manages a portfolio of prospects</li> <li>• Responsible for securing corporate financial support for the University</li> <li>• Directs and manages a team of officers in the identification, cultivation, solicitation and stewardship of major corporations and foundations</li> <li>• Develops and is accountable for meeting overall department goals and objectives for major gift cultivation and solicitation</li> <li>• Develops and manages prospect strategy for the team</li> <li>• Develops tracking mechanisms used to measure goals</li> <li>• Provides direction, mentoring and training to staff</li> <li>• Analyzes and assigns areas of solicitation to staff</li> <li>• Works with financial advisors, Harvard Management Company, donors and campaign directors</li> </ul>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Manages a small to medium sized Corporate and Foundation Relations function; solicits gifts of 5+ million</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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## 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"> <li>• Creates, plans and implements marketing strategies to increase planned giving activity</li> <li>• Manages a portfolio of planned giving prospects and donors and provides ongoing stewardship for planned gifts</li> <li>• Works with planned giving and other development staff to develop strategies for giving campaigns</li> <li>• Works with financial advisors, Harvard Management Company, and donors</li> </ul>	<p><b>IMPACT</b> Moderate impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides comprehensive consultation on planned giving for a defined group</p>	<p><b>RECEIVED</b> <b>Under General Direction:</b> 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><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## 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
58E	Planned Giving Officer II	<p>Bachelor's degree</p> <p>7+ years of progressive experience in 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"> <li>• Prospects, cultivates, and designs strategies for planned giving prospects</li> <li>• Serves as internal consultant to senior fundraisers to develop and coordinate donor relations activities</li> <li>• Works closely with development department to ensure consistency in projects and programs addressing donors</li> <li>• Works with financial advisors, Harvard Management Company, and donors</li> </ul>	<p><b>IMPACT</b> Significant impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Provides comprehensive consultation on planned giving for a broad group</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Supervises:</b> Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

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## 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
59E	Planned Giving Management I	<p>Bachelor's degree</p> <p>8+ years of progressive experience in 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"> <li>Works with University, School and Affiliate colleagues to promote increased planned gift activity across the University</li> </ul>	<p><b>IMPACT</b> Substantial impact on operations, resources, or University's reputation</p> <p><b>SCOPE</b> Oversees planned giving department of medium school</p>	<p><b>RECEIVED</b> <b>Under Limited Direction:</b> 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.</p> <p><b>GIVEN</b> <b>Manages:</b> 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.</p>

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