

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"> Works with University, School and Affiliate colleagues to promote increased planned gift activity across the University 	<p>IMPACT Substantial impact on operations, resources, or University's reputation</p> <p>SCOPE Oversees planned giving department of medium school</p>	<p>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.</p> <p>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.</p>

NOTE:

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