

ALUMNI AFFAIRS AND DEVELOPMENT JOB FUNCTION GUIDE

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"> • 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 	<p>IMPACT Significant impact on operations, resources, or University's reputation</p> <p>SCOPE Provides comprehensive consultation on planned giving for a broad group</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 Supervises: Supervises work and processes, assigns work, typically has primary responsibility for evaluating performance and performance management, effectively recommends hiring and firing decisions.</p>

NOTE:

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