



Alumni Affairs and Development Job Family: **Gift Planning Officer Progression**

These generic job title summaries are intended to indicate the kinds of tasks and levels of work complexity that will be required of positions classified to any of these titles and are not intended to be construed as declaring the specific duties and responsibilities of any particular position. The use of particular expressions or illustrations describing functions within a specific job title does not exclude other duties of a similar kind and/or level of complexity. Positions are classified to a particular job title based upon the predominant level of expected work complexity. ***A position that is classified into this title and band must meet the Cornell requirements for exemption under the FLSA.***

GENERIC JOB PROFILE SUMMARIES

Gift Planning Officer III INDIVIDUAL CONTRIBUTOR	Gift Planning Officer IV INDIVIDUAL CONTRIBUTOR	Gift Planning Officer V MANAGEMENT
Responsible for marketing, developing and closing planned gifts, stewarding planned giving donors, supporting college & unit staffs, and implementing and maintaining a cohesive advertising and public relations campaign for planned gifts.	Responsible for marketing, developing and closing planned gifts, stewarding planned giving donors, supporting college & unit staffs, and implementing and maintaining a cohesive advertising and public relations campaign for planned gifts.	Responsible for the management, coordination and execution of all planned giving activities including managing personnel, marketing, developing and closing planned gifts, stewarding planned giving donors and senior volunteer leadership, supporting project teams, college and unit and regional staff, and implementing and maintaining a cohesive advertising and public relations campaign for planned gifts.
		Plans and directs the institution's program for generating support through wills, bequests, trusts, pooled income funds, deferred gifts, and annuities Identifies, cultivates, and solicits prospective individual donors.
Provides technical expertise in planned giving to current and prospective donors regarding the tax and financial aspects and consequences of various planned giving programs, to ensure the best interests of both the donor and the Institution are met.	Provides technical expertise in planned giving to current and prospective donors regarding the tax and financial aspects and consequences of various planned giving programs, to ensure the best interests of both the donor and the Institution are met.	Provides technical expertise in planned giving to donors and staff regarding the tax and financial aspects and consequences of various planned giving programs to both the donor and the Institution.
Identifies, cultivates and motivates donors to make significant gifts assisting them with gift planning strategies, financial and estate planning, tax law and real estate.	Identifies, cultivates and motivates donors to make significant gifts assisting them with gift planning strategies, financial and estate planning, tax law and real estate.	Manage and participate in the process of identifying, cultivating, and structuring planned gift arrangements, manage, facilitate and insure closing and stewardship of individual accounts for planned gifts. This involves not only management of dedicated planned giving staff but concerted collaborative efforts with all University populations: faculty, administration, trustees, staff and volunteer leadership.

Gift Planning Officer III INDIVIDUAL CONTRIBUTOR	Gift Planning Officer IV INDIVIDUAL CONTRIBUTOR	Gift Planning Officer V MANAGEMENT
Develops and markets bequests, life income agreements, trusts and other forms of planned giving opportunities. Prepare proposals and closes gift as appropriate.	Develops and markets bequests, life income agreements, trusts and other forms of planned giving opportunities. Prepare proposals and closes gift as appropriate.	
Follow-up on all inquiries regarding planned gifts. For gifts from financial assets, perform necessary research to properly advise donor. Structure gift arrangements to suit donor's circumstances and interests.	Follow-up on all inquiries regarding planned gifts. For gifts from financial assets, perform necessary research to properly advise donor. Structure gift arrangements to suit donor's circumstances and interests.	Ensure professional follow-up on all inquiries regarding planned gifts or requests for planned giving support to referenced population groups. Insure planned giving staff and other AA&D staff and volunteers have technical knowledge sufficient to engender confidence during interaction with donor and donor's legal and financial advisors.
Identifies prospective individuals who may have an interest in planned gifts, does research, makes initial contact, prepares proposals and closes gifts as appropriate. Maintain appropriate records and reports.	Identifies prospective individuals who may have an interest in planned gifts, does research, makes initial contact, prepares proposals and closes gifts as appropriate. Maintain appropriate records and reports.	
Act as principal planned giving contact for several colleges, units and individual giving areas. Develop and lead seminars and workshops on planned giving and real estate as requested.	Act as principal planned giving contact for several colleges, units and individual giving areas. Develop and lead seminars and workshops on planned giving and real estate as requested.	Develop, manage and implement training and consulting to all relevant parties less sophisticated in certain gift types and vehicles to maximize their ability to identify, cultivate, structure gift arrangements, close and steward individual accounts for planned gifts.
Creates new programs to support planned-giving; such as new planned-giving instruments, recognition programs and new marketing programs to Communicate the benefits of planned gifts.	Creates new programs to support planned-giving; such as new planned-giving instruments, recognition programs and new marketing programs to communicate the benefits of planned gifts.	Direct and oversee implementation and maintenance of a cohesive advertising and public relations campaign including newsletters, topical brochures, seminar/ public speaking opportunities, and collaborative marketing with College & Unit, Cornell Fund and Individual Giving departments. Serve as a Business Unit Expert.
		Direct, coordinate, administer and supervise Cornell University's Real Estate Gift Program in close cooperation with University Counsel, Real Estate Department and Sr. Trust Officer.
		Direct and oversee relationship with the Cornell Fund to develop a cohesive approach to each Reunion cycle - especially 35th through 60th Reunions. All follow-up, internal and external, plus oversight of both departmental efforts. Traditional management duties related to meetings, supervision, coordination and documentation of a substantial sub-set of the activities of the Trusts, Estates and Planned Giving Office.

JOB FACTOR PROFILE TABLE

FACTOR PROFILE	11537 GIFT PLANNING OFFICER III, BAND G	11538 GIFT PLANNING OFFICER IV, BAND H	11539 GIFT PLANNING OFFICER V, BAND I
MINIMUM EDUCATION AND EXPERIENCE EQUIVALENCY	Bachelor’s degree or equivalent; 3 but less than 5 years of experience or equivalent	Bachelor’s degree or equivalent; 5 but less than 7 years of experience or equivalent	Master’s degree or equivalent; 7 but less than 10 years of experience or equivalent
IMPACT	Substantial impact	Significant impact	Significant impact
CONTACTS - INSIDE	Collaboration and/or teamwork only Persuade others to take particular course of action	Occasionally coordinate major activities Occasionally persuade others to take particular course of action	High-level interaction Involved in diverse and highly sensitive or confidential activities
CONTACTS - OUTSIDE	Develop and make presentations and negotiate with others	Develop and make presentations and negotiate with others	Develop and make presentations and negotiate with others
CONTACTS - STUDENTS	Occasional contact to provide information and instruction	Occasional contact to provide information and instruction	Occasional contact to provide information and instruction

FACTOR PROFILE	11537 GIFT PLANNING OFFICER III, BAND G	11538 GIFT PLANNING OFFICER IV, BAND H	11539 GIFT PLANNING OFFICER V, BAND I
SUPERVISION	Unlikely to provide day-to-day supervisory direction to employees within the department	Provide day-to-day supervisory direction to employee(s) within the department	Responsible for providing supervisory direction to other supervisors
COMPLEXITY	Rarely required to develop new, imaginative or innovative solutions, services, products, process or programs. Duties involve diverse and unrelated processes; work requires sophisticated reasoning skills	Occasionally required to develop new, imaginative or innovative solutions, services, products, process or programs. Duties involve diverse and unrelated processes; work requires sophisticated reasoning skills	Continually required to develop new, imaginative or innovative solutions, services, products, processes or programs; work requires conceptual and imaginative thinking in a highly complex and uncharted environment
LEVEL OF DECISION MAKING	Minimum responsibility for assisting in and influencing decisions concerning policy-setting, research, planning or students	Some responsibility for assisting in and influencing decisions concerning policy-setting, research, planning or students	Responsible for making decisions concerning policy-setting, research, planning or students
EFFECT OF DECISION MAKING	Directly affect several departments within a college, school, or administrative unit	Directly affect more than one college, school, administrative unit, etc	Directly affect entire college or school administrative unit Critical effect on students and employees
FREEDOM OF ACTION	Very general supervision Interpretation of work policies and procedures, and, at times, deviation from standard work practices	Little direct supervision Considerable latitude for exercising judgment and self-direction	Little direct supervision Considerable latitude for exercising judgment and self-direction
WORKING CONDITIONS	Normal working conditions, including limited or no exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including limited or no exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including limited or no exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required