

Survey Position Grids

EXECUTIVE MANAGEMENT	Family Level	Program					Knowledge			
		Program 100	Program - Grantmaking and Community Outreach 110	Program / Project Management 140	Grants Management 200	Public Policy 210	Evaluation 225	Research 250	Library 255	Knowledge Management / Learning 260
10 Chief Executive Officer 20 Chief Operating Officer	Brief Job Family Descriptions	Develops, implements, coordinates and adjusts the foundation's grantmaking strategies and activities to ensure achievement of the established mission and goals.	Combines grantmaking with relationship building to identify and evaluate fundable programs and the community leaders who can champion programs after funding.	Manages, tracks and coordinates program activities, including planning, scheduling and budgeting, to ensure alignment with strategic vision of foundation and compliance with budget and guidelines.	Administers the grant cycle, including the application, approval, distribution and evaluation process. Grants management activities include research, structure, administration, compliance and review.	Develops, manages and implements the foundation's public policy initiatives to advance policies at the state and/or federal level. The policy function engages policymakers and influences policy through communications and outreach.	Plans, manages and performs analyses to assess the effectiveness of foundation programs and initiatives. Develops recommendations based on evaluations.	Conceives of, plans and conducts research to inform the foundation's grantmaking strategies.	Develops, organizes, maintains and enhances the foundation's content and digital asset archives.	Assesses, develops and implements organization, department and individual training plans and programs to engage and develop the foundation's human resources and, if applicable, the foundation's knowledge management systems.
	Top	10010 Top Program Position (Single Incumbent) 10011 Top Program Position (Multiple Incumbents)			20010 Top Grants Mgmt Position	21010 Top Public Policy Position	22510 Top Evaluation Position	25010 Top Research Position		26010 Chief Learning Officer
	Program Leadership Director	10014 Program Director			20014 Director, Grants	21014 Director, Public Policy				26014 Director, Knowledge Mgmt / Learning
	Senior Officer Senior Manager	10015 Sr Program Officer - Grantmaking / Initiatives	11015 Sr Program Officer - Grantmaking / Community Outreach		20015 Sr Manager, Grants <i>(New)</i>	21015 Sr Program Officer, Public Policy	22515 Senior Evaluation Officer			26015 Senior Manager, Knowledge Mgmt / Learning <i>(New)</i>
	Officer Manager	10016 Program Officer - Grantmaking / Initiatives	11016 Program Officer - Grantmaking / Community Outreach		20016 Manager, Grants	21016 Program Officer, Public Policy	22516 Evaluation Officer	25016 Research Officer		26016 Manager, Knowledge Mgmt / Learning
	Senior Individual Contributor	10024 Senior Program Associate		14024 Senior Program / Project Manager	20024 Senior Grants Mgmt Associate	21024 Senior Public Policy Associate <i>(New)</i>	22524 Senior Evaluation Associate <i>(New)</i>			
	Individual Contributor	10025 Program Associate		14025 Program / Project Manager	20025 Grants Mgmt Associate	21025 Public Policy Associate	22525 Evaluation Associate	25025 Research Associate	25525 Librarian	26025 Knowledge Mgmt / Learning Specialist
	Junior Individual Contributor									
	Coordinator	10027 Senior Program Assistant								
	Assistant	10028 Program Assistant			20028 Grants Mgmt Assistant			25028 Research Assistant		

Survey Position Grids

Family Level	Data and Analytics 265	Communications					Convenings and Events	
		Communications 270	Writing / Editing 272	Multimedia Production 275	Website 280	Digital / Social Media (New Family) 285	Convening / Event Planning 300	Audio / Visual Engineering 350
Brief Job Family Descriptions	The data and analytics function develops and executes the foundation's research and analytics capabilities.	Develops and communicates the foundation's desired image and messaging to stakeholders, including the press, grantees, the public and staff.	The writing / editing function develops and edits written content to support the foundation's mission and operations.	Develops long- and short-form multimedia content for distribution across multiple digital distribution channels. Creates multimedia to meet messaging objectives. Produces and optimizes content for different channels.	Maintains and enhances the foundation's website, including developing the design and technical functionality, managing content and ensuring secure and uninterrupted operation.	Directs and implements digital media strategies and initiatives involving the development, distribution and analyses of content on digital platforms. Develops and expands the foundation's digital and social media presence.	Plans, develops and organizes public, private and/or online meetings, events, conferences, seminars or convenings that promote the foundation's mission and engage audiences.	Sets up and operates audio and video equipment at events, conferences, seminars and meetings. Maintains, upgrades and troubleshoots technology and equipment.
Top		27010 Top Communications Position						
Program Leadership Director	26514 Director, Data and Analytics (New)	27014 Director, Communications					30014 Director, Convening / Event Planning	
Senior Officer Senior Manager	26515 Senior Manager, Data and Analytics	27015 Senior Communications Officer				28515 Senior Manager, Digital / Social Media (New)		
Officer Manager		27016 Communications Officer			28016 Manager, Website	28516 Manager, Digital / Social Media (New)	30016 Manager, Convening / Event Planning	
Senior Individual Contributor	26524 Senior Data and Analytics Analyst (New)		27224 Sr Writer / Editor	27524 Multimedia Producer		28524 Senior Digital / Social Media Specialist (New)	30024 Senior Meeting Planner	
Individual Contributor	26525 Data and Analytics Analyst	27025 Communications Associate	27225 Writer / Editor		28025 Website Editor	28525 Digital / Social Media Specialist (New)	30025 Meeting Planner	35025 Audio / Visual Engineer
Junior Individual Contributor								
Coordinator							30027 Setup Coordinator	
Assistant		27028 Communications Assistant						

Survey Position Grids

Family Level	Investment				General and Administrative					
	Investment Management 400	Investment Operations (New Family) 410	Investment Accounting 450	Social Investments 460	Office of the CEO 490	Finance / Accounting 500	Financial Analysis 510	Tax 520	Payroll 530	Legal 550
Brief Job Family Descriptions	Develops, implements and monitors investment policy and asset allocation decisions to preserve and grow the assets of the foundation. Monitors and evaluates economic markets and portfolio performance.	Oversees and executes the operational management and administration of the foundation's investment portfolio(s), including trading and transactional support, performance reporting and analytics, database development and maintenance, and report production.	Provides financial accounting and reporting for the foundation's investment portfolio. Activities include tracking investments, ensuring accuracy and compliance of investment activities, and may include tax reporting for the foundation's investment portfolio.	Identifies, structures and implements social investments (e.g., program-related investments (PRIs), mission-related investments (MRIs)) with entities that advance the foundation's mission.	Drives and implements the CEO's goals, initiatives, and long-range plans through project management, information sharing, influencing, relationship stewardship and other support.	Oversees and executes financial and accounting operations of the foundation, including financial analysis, reporting, accounting, tax and regulatory compliance. Ensures compliance with generally accepted accounting principles. May include investment management or administrative oversight.	Conducts forecasting, planning and budgeting. Reports on variances and updates forecasts and models. Supports planning and decision-making with financial modeling.	Manages tax strategy, completes tax filings and ensures the foundation remains in compliance with IRS regulations.	Performs payroll and related functions, ensuring the disbursement of payroll, payroll taxes and employee benefit payments in compliance with laws and regulations. Prepares payroll and related reports.	Protects the ordinary and special interests and activities of the foundation. Ensures regulatory compliance and best practices. Drafts and reviews agreements and contracts.
Top	40010 Top Investment Position				49010 Chief of Staff	50010.1 CFO, with Admin 50010.2 CFO, with Investment Mgmt 50010.3 CFO, Finance and Acctng Only				55010 Top Legal Position
Program Leadership Director	40014 Director, Investment Management	41014 Director, Investment Operations (New)	45014 Director, Investment Accounting	46014 Director, Social Investments		50014 Director, Finance				55014 Associate General Counsel
Senior Officer Senior Manager		41015 Senior Manager, Investment Operations (New)				50015 Controller				
Officer Manager	40016 Investment Officer	41016 Manager, Investment Operations (New)		46016 Social Investments Officer		50016 Manager, Accounting		52016 Manager, Tax	53016 Manager, Payroll	55016 Staff Counsel / Attorney
Senior Individual Contributor	40024 Senior Investment Analyst	41024 Senior Investment Operations Specialist (New)	45024 Senior Investment Accountant	46024 Senior Social Investments Analyst	49024.1 Special Asst to CEO 49024.2 Board Liaison	50024 Senior Accountant	51024 Senior Financial Analyst	52024 Tax Officer		55024 Senior Paralegal (New)
Individual Contributor	40025 Investment Analyst	41025 Investment Operations Specialist (New)	45025 Investment Accountant	46025 Social Investments Analyst		50025 Accountant	51025 Financial Analyst			55025 Paralegal
Junior Individual Contributor										
Coordinator									53027 Payroll Specialist	
Assistant						50028 Accounting Assistant				

Survey Position Grids

Family Level	General and Administrative (Continued)						
	Human Resources 575	Diversity, Equity and Inclusion 580	Compensation and Benefits 585	Administration 700	Facilities 750	Project Management 760	Operational Strategy and Planning (New Family) 770
Brief Job Family Descriptions	Develops and implements programs to attract and retain employees and develop the professional growth and productivity of employees. Ensures that the foundation incorporates best practices and operates in compliance with regulatory entities.	Develops, administers and monitors strategies, programs and initiatives to achieve a diverse, equitable and inclusive environment within the foundation, as well as in communities or entities being served.	Develops and administers policies, programs and processes for pay, rewards and benefits.	Plans for and ensures that staff, equipment, supplies and other resources are managed and allocated effectively.	Plans, maintains and improves the physical facility and grounds, including buildings, utilities, equipment, machinery and other physical infrastructure. Accountable for the safety and security of structures and premises. Plans and manages renovations and facility improvements.	Coordinates the work of multi-disciplinary teams on cross-foundation projects from inception through timely completion.	Optimizes the foundation's operational effectiveness and efficiency. May be deployed to any area and/or initiative in the foundation depending on evolving organizational needs.
Top	57510 Top Human Resources Position			70010 Top Administration Position			
Program Leadership Director	57514 Director, Human Resources	58014 Director, Diversity, Equity and Inclusion		70014 Director, Office Services	75014 Director, Facilities		77014 Director, Operational Strategy and Planning (New)
Senior Officer Senior Manager		58015 Senior Manager, Diversity, Equity and Inclusion					77015 Senior Manager, Operational Strategy and Planning (New)
Officer Manager	57516 Manager, Human Resources	58016 Manager, Diversity, Equity and Inclusion	58516 Manager, Compensation and Benefits	70016 Manager, Office Services	75016 Manager, Facilities		77016 Manager, Operational Strategy and Planning (New)
Senior Individual Contributor	57524 Senior Human Resources Specialist		58524 Senior Compensation and Benefits Analyst		75024 Chief Facilities Engineer		
Individual Contributor	57525 Human Resources Specialist	58025 Diversity, Equity and Inclusion Specialist		70025 Office Manager	75025 Facilities Engineer	76025 Project Manager	
Junior Individual Contributor							
Coordinator	57527 Human Resources Coordinator			70027.1 Exec Asst to CEO 70027.2 Exec Asst to Senior Exec Position 70027.3 Administrative Asst			
Assistant				70028 Office Assistant	75028 Receptionist		

Survey Position Grids

Family Level	Technology					Community Foundations				
	Information Technology 800	System Administration 820	Business Systems Analysis 830	Information Technology Project Management 840	Customer Relationship Management ("CRM") Administration 905	Development 920	Donor Services 930	Events 935	Scholarship 940	Gift Planning 945
Brief Job Family Descriptions	Manages, maintains and upgrades the technology infrastructure of the foundation. Ensures the security and integrity of foundation's information systems, storage and connectivity.	Configures, installs, upgrades, maintains and troubleshoots hardware and software infrastructure to ensure the reliability and performance of the foundation's technology systems.	Analyzes business user requirements and translates them into specifications for information technology software engineers to develop information technology solutions and systems.	Plans, manages and guides information technology initiatives to ensure that projects meet objectives.	Ensures the integrity and accessibility of the foundation's contact database. Configures CRM (e.g., Salesforce, Microsoft Dynamics) and its reports to meet the information needs of users. Trains and provides technical support to users. Troubleshoots technical problems.	Develops, manages, implements and coordinates strategies for gift prospecting and donor stewardship. Grows the community foundation's assets by obtaining new gifts and donor funds through relationship building and management.	Provides high-quality, efficient and responsive client service support and stewardship.	Plans, manages, produces and organizes public, private and/or online events that promote the community foundation's mission and engage audiences.	Develops, manages and implements the community foundation's scholarship programs, including application development, processing, evaluation, award distribution and compliance with federal requirements and donor criteria.	The gift planning function develops, manages and implements strategies to attract prospective major, planned and legacy donors to fulfill the community foundation's philanthropic and financial goals.
Top	80010 Top IT Position					92010 Top Development Position	93010 Top Donor Services Position			
Program Leadership Director	80014 Director, IT					92014 Director, Development	93014 Director, Donor Services	93514 Director, Events	94014 Director, Scholarship	94514 Director, Gift Planning
Senior Officer Senior Manager	80015 Senior Manager, IT									
Officer Manager	80016 Manager, IT				90516 Manager, CRM <i>(New)</i>	92016 Manager, Development	93016 Manager, Donor Services	93516 Manager, Events	94016 Manager, Scholarship	
Senior Individual Contributor	80024 Senior Network Engineer <i>(New)</i>	82024 Senior Systems Administrator <i>(New)</i>	83024 Senior Business Systems Analyst	84024 Senior IT Project Manager <i>(New)</i>	90524 Senior CRM Administrator <i>(New)</i>	92024 Senior Development Associate	93024 Senior Donor Services Advisor			
Individual Contributor	80025 Network Engineer	82025 Systems Administrator	83025 Business Systems Analyst	84025 IT Project Manager	90525 CRM Administrator	92025 Development Associate	93025 Donor Services Advisor	93525 Events Associate	94025 Scholarship Associate	
Junior Individual Contributor										
Coordinator	80027 Technical Support Specialist							93527 Events Coordinator		
Assistant	80028 Technical Support Assistant					92028 Development Assistant	93028 Donor Services Assistant		94028 Scholarship Assistant	