

Survey Position Grids

EXECUTIVE MANAGEMENT	Family Level	Program						
		Program 100	Program - Grantmaking and Community Outreach 110	Program - Fellowship Programs (New Family) 120	Initiatives (New Family) 130	Program / Project Management 140	Grants Management 200	Public Policy 210
10 Chief Executive Officer 20 Chief Operating Officer 30 Chief Strategy Officer 40 Chief Communications Officer (New) 50 Chief People Officer (New) 60 Chief Administrative Officer (New)	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.	Develops, implements and administers leadership development programs to support early career professionals in building philanthropic competencies. Fellowship programs typically incorporate a structured curriculum, experiential learning, coaching / mentoring by foundation leaders, and opportunities for peer engagement and networking.	Provides leadership, direction and day-to-day management of targeted, time-limited special initiatives and campaigns, beyond the foundation's core programs, that align strategically with the foundation's established mission and goals.	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.
	Top	10010 Top Program Position (Single Incumbent) 10011 Top Program Position (Multiple Incumbents)					20010 Top Grants Mgmt Position	21010 Top Public Policy Position
	Program Leadership Director	10014 Program Director		12014 Fellowship Programs Director (New)	13014 Initiatives Director (New)		20014 Director, Grants	21014 Director, Public Policy
	Senior Officer Senior Manager	10015 Senior Program Officer - Grantmaking / Initiatives	11015 Senior Program Officer - Grantmaking / Community Outreach	12015 Senior Fellowship Programs Officer (New)			20015 Senior Manager, Grants	21015 Senior Program Officer, Public Policy
	Officer Manager	10016 Program Officer - Grantmaking / Initiatives	11016 Program Officer - Grantmaking / Community Outreach	12016 Fellowship Programs Officer (New)			20016 Manager, Grants	21016 Program Officer, Public Policy
	Senior Individual Contributor	10024 Senior Program Associate				14024 Senior Program / Project Manager	20024 Senior Grants Mgmt Associate	21024 Senior Public Policy Associate
	Individual Contributor	10025 Program Associate				14025 Program / Project Manager	20025 Grants Mgmt Associate	21025 Public Policy Associate
	Junior Individual Contributor							
	Coordinator	10027 Senior Program Assistant						
	Assistant	10028 Program Assistant					20028 Grants Mgmt Assistant	

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Family Level	Knowledge					Communications				
	Evaluation 225	Research 250	Library 255	Knowledge Management / Learning 260	Data and Analytics 265	Communications 270	Writing / Editing 272	Multimedia Production 275	Website 280	Digital / Social Media 285
Brief Job Family Descriptions	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.	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.
Top	22510 Top Evaluation Position	25010 Top Research Position		26010 Chief Learning Officer		27010 Top Communications Position				
Program Leadership Director	22514 Director, Evaluation <i>(New)</i>			26014 Director, Knowledge Mgmt / Learning	26514 Director, Data and Analytics	27014 Director, Communications				
Senior Officer Senior Manager	22515 Senior Evaluation Officer			26015 Senior Manager, Knowledge Mgmt / Learning	26515 Senior Manager, Data and Analytics	27015 Senior Communications Officer				28515 Senior Manager, Digital / Social Media
Officer Manager	22516 Evaluation Officer	25016 Research Officer		26016 Manager, Knowledge Mgmt / Learning		27016 Communications Officer			28016 Manager, Website	28516 Manager, Digital / Social Media
Senior Individual Contributor	22524 Senior Evaluation Associate				26524 Senior Data and Analytics Analyst	27024 Senior Communications Associate <i>(New)</i>	27224 Senior Writer / Editor	27524 Multimedia Producer		28524 Senior Digital / Social Media Specialist
Individual Contributor	22525 Evaluation Associate	25025 Research Associate	25525 Librarian	26025 Knowledge Mgmt / Learning Specialist	26525 Data and Analytics Analyst	27025 Communications Associate	27225 Writer / Editor		28025 Website Editor	28525 Digital / Social Media Specialist
Junior Individual Contributor										
Coordinator										
Assistant		25028 Research Assistant				27028 Communications Assistant				

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Family Level	Convenings and Events		Investment				General and Administrative			
	Convening / Event Planning	Audio / Visual Engineering	Investment Management	Investment Operations	Investment Accounting	Social Investments	Finance / Accounting	Financial Analysis	Tax	Payroll
	300	350	400	410	450	460	500	510	520	530
Brief Job Family Descriptions	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.	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.	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 and other tax authority 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.
Top			40010 Top Investment Position				50010.1 CFO, with Administration 50010.2 CFO, with Investment Mgmt 50010.3 CFO, Finance and Accounting Only		52010 Top Tax Position <i>(New)</i>	
Program Leadership Director	30014 Director, Convening / Event Planning		40014 Director, Investment Management	41014 Director, Investment Operations	45014 Director, Investment Accounting	46014 Director, Social Investments	50014 Director, Finance		52014 Director, Tax <i>(New)</i>	
Senior Officer Senior Manager				41015 Senior Manager, Investment Operations		46015 Senior Social Investments Officer <i>(New)</i>	50015 Controller			
Officer Manager	30016 Manager, Convening / Event Planning		40016 Investment Officer	41016 Manager, Investment Operations		46016 Social Investments Officer	50016 Manager, Accounting	51016 Manager, Financial Analysis <i>(New)</i>	52016 Manager, Tax	53016 Manager, Payroll
Senior Individual Contributor	30024 Senior Meeting Planner		40024 Senior Investment Analyst	41024 Senior Investment Operations Specialist	45024 Senior Investment Accountant	46024 Senior Social Investments Analyst	50024 Senior Accountant	51024 Senior Financial Analyst	52024 Tax Officer	
Individual Contributor	30025 Meeting Planner	35025 Audio / Visual Engineer	40025 Investment Analyst	41025 Investment Operations Specialist	45025 Investment Accountant	46025 Social Investments Analyst	50025 Accountant	51025 Financial Analyst	52025 Tax Specialist <i>(New)</i>	
Junior Individual Contributor										
Coordinator	30027 Setup Coordinator									53027 Payroll Specialist
Assistant							50028 Accounting Assistant			

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Family Level	General and Administrative (Continued)				Enterprise-wide		
	Legal 550	Contracts Administration (New Family) 560	Human Resources 575	Compensation and Benefits 585	Office of the CEO 650	Administration 700	Facilities 750
	Brief Job Family Descriptions	Protects the ordinary and special interests and activities of the foundation. Ensures regulatory compliance and best practices. Drafts and reviews agreements and contracts.	Drafts, reviews and administers agreements and contracts. Alerts relevant parties in advance of expiration to facilitate extensions and/or renewals. Supports attorneys and internal foundation stakeholders.	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 and administers policies, programs and processes for pay, rewards and benefits.	Drives and implements the CEO's goals, initiatives, and long-range plans through project management, information sharing, influencing, relationship stewardship and other support.	Plans for and ensures that staff, equipment, supplies and other resources are managed and allocated effectively.
Top	55010 Top Legal Position		57510 Top Human Resources Position		65010 Chief of Staff	70010 Top Administration Position	
Program Leadership Director	55014 Associate General Counsel		57514 Director, Human Resources			70014 Director, Office Services	75014 Director, Facilities
Senior Officer Senior Manager	55015 Senior Staff Counsel / Attorney (New)						
Officer Manager	55016 Staff Counsel / Attorney	56016 Manager, Contracts Administration (New)	57516 Manager, Human Resources	58516 Manager, Compensation and Benefits	65016.1 Chief of Staff (Manager level) 65016.2 Governance Manager (New)	70016 Manager, Office Services	75016 Manager, Facilities
Senior Individual Contributor	55024 Senior Paralegal	56024 Senior Contracts Administrator (New)	57524 Senior Human Resources Specialist	58524 Senior Compensation and Benefits Analyst	65024.1 Special Asst to CEO 65024.2 Board Liaison		75024 Chief Facilities Engineer
Individual Contributor	55025 Paralegal	56025 Contracts Administrator (New)	57525 Human Resources Specialist			70025 Office Manager	75025 Facilities Engineer
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

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Family Level	Enterprise-wide (Continued)				Technology				
	Project Management 760	Operational Strategy and Planning 770	Diversity, Equity and Inclusion 775	Enterprise Risk Management 780	Information Technology 800	Systems Administration 820	Business Systems Analysis 830	Information Technology Project Management 840	Customer Relationship Management ("CRM") Administration 905
Brief Job Family Descriptions	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.	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, implements and administers strategies, policies and procedures to identify, assess, monitor and mitigate foundation-wide risks, including security, operations, finance, safety and compliance.	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.
Top			77510 Top Diversity, Equity and Inclusion Position <i>(New)</i>		80010 Top IT Position				
Program Leadership Director		77014 Director, Operational Strategy and Planning	77514 Director, Diversity, Equity and Inclusion	78014 Director, Enterprise Risk Management	80014 Director, IT	82014 Director, Systems Administration <i>(New)</i>			
Senior Officer Senior Manager		77015 Senior Manager, Operational Strategy and Planning	77515 Senior Manager, Diversity, Equity and Inclusion		80015 Senior Manager, IT	82015 Senior Manager, Systems Administration <i>(New)</i>			
Officer Manager		77016 Manager, Operational Strategy and Planning	77516 Manager, Diversity, Equity and Inclusion	78016 Manager, Enterprise Risk Management	80016 Manager, IT	82016 Manager, Systems Administration <i>(New)</i>			90516 Manager, CRM
Senior Individual Contributor	76024 Senior Project Manager <i>(New)</i>			78024 Senior Enterprise Risk Management Specialist	80024 Senior Network Engineer	82024 Senior Systems Administrator	83024 Senior Business Systems Analyst	84024 Senior IT Project Manager	90524 Senior CRM Administrator
Individual Contributor	76025 Project Manager		77525 Diversity, Equity and Inclusion Specialist	78025 Enterprise Risk Management Specialist	80025 Network Engineer	82025 Systems Administrator	83025 Business Systems Analyst	84025 IT Project Manager	90525 CRM Administrator
Junior Individual Contributor									
Coordinator					80027 Technical Support Specialist				
Assistant					80028 Technical Support Assistant				

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Family Level	Community Foundations					International	
	Development 920	Donor Services 930	Events 935	Scholarship 940	Gift Planning 945	International Program (New Family) 980	International Communications (New Family) 985
	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.	Develops, implements, coordinates and adjusts the foundation's grantmaking strategies and activities for assigned region(s) outside the U.S. to ensure achievement of the established mission and goals.	Develops and communicates the foundation's desired image and messaging to stakeholders, including the press, grantees, the public and staff, for assigned region(s) outside the U.S.
Brief Job Family Descriptions							
Top	92010 Top Development Position	93010 Top Donor Services Position				98010 Top International Program Position <i>(New)</i>	98510 Top International Communications Position <i>(New)</i>
Program Leadership Director	92014 Director, Development	93014 Director, Donor Services	93514 Director, Events	94014 Director, Scholarship	94514 Director, Gift Planning	98014 International Program Director <i>(New)</i>	98514 Director, International Communications <i>(New)</i>
Senior Officer Senior Manager						98015 Senior International Program Officer / Grantmaking Initiatives <i>(New)</i>	
Officer Manager	92016 Manager, Development	93016 Manager, Donor Services	93516 Manager, Events	94016 Manager, Scholarship		98016 International Program Officer / Grantmaking Initiatives <i>(New)</i>	98516 Manager, International Communications <i>(New)</i>
Senior Individual Contributor	92024 Senior Development Associate	93024 Senior Donor Services Advisor				98024 International Senior Program Associate <i>(New)</i>	98524 Senior International Communications Associate <i>(New)</i>
Individual Contributor	92025 Development Associate	93025 Donor Services Advisor	93525 Events Associate	94025 Scholarship Associate		98025 International Program Associate <i>(New)</i>	98525 International Communications Associate <i>(New)</i>
Junior Individual Contributor							
Coordinator			93527 Events Coordinator				
Assistant	92028 Development Assistant	93028 Donor Services Assistant		94028 Scholarship Assistant			