



WILLIAM & MARY

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

Administrative Coordinator for Assistant Vice President, Principal Gifts & Gift Planning

Mission Statement

We create the conditions for opportunity – human, financial & experiential – by garnering and stewarding the resources that advance William & Mary.

The William & Mary Foundation's defining and essential mission is to support the university's people and programs. By seeking private support, and then diligently managing those funds, the W&M Foundation advances and furthers the work of William & Mary's students and faculty — providing vital resources for scholarships, professorships, research and program funding.

Consistent with the university's shared services agreement with the William & Mary Foundation (WMF), this position is assigned 20% effort to support Foundation Services LLC, a subsidiary of WMF, with the responsibilities outlined below.

Position Summary

The Administrative Coordinator for the Assistant Vice President for Principal Gifts & Gift Planning is a key member of the team in the Office of University Advancement at William & Mary and has responsibilities to serve both the university and the William & Mary Foundation. University Advancement includes all William & Mary efforts related to alumni engagement, private fundraising and philanthropic outreach, and marketing. The team's overarching goal is to create a lasting, robust culture of engagement and philanthropy by engaging students, alumni, parents and friends, corporations and foundations, and faculty and staff. William & Mary's ability to flourish and advance as a world-class university depends largely upon the active support of these key stakeholders.

Reporting to the Assistant Vice President for Principal Gifts & Gift Planning (AVP), the Administrative Coordinator's primary duty is to provide executive-level support to the AVP in support of our efforts to secure private funding for the university. They serve as primary administrative support for the AVP and work closely and collaboratively with the President's and Vice President's Offices and with other key areas of campus as needed. The Administrative Coordinator also serves as the primary support staff liaison for the Office of Gift Planning and assists in all special projects assigned to members of the team.

The Administrative Coordinator's support of the team's includes coordinating meeting logistics, staff travel and expense reports, writing and editing proposals, correspondence, benefit illustrations, agendas, reports and presentation materials. The Administrative Coordinator maintains and analyzes data related to Boyle Legacy Society membership, prepares planned giving reports and assists as needed with other data and reports; they also assist with high-level individual donor stewardship and with more general stewardship initiatives. Finally, the Administrative Coordinator serves as office manager, responsible for budget and business operations, which includes preparing invoices, tracking and reconciling expenses, assisting in the development of budget forecasts and the annual budget review process as well as maintaining and culling data and updating data on the website.

The Administrative Coordinator will be a proactive member of the development team, a champion for diversity and equity who will find innovative ways to incorporate diverse perspectives into all aspects of their work. This is a hybrid position based in Williamsburg, Virginia, that offers a flexible work environment.

Please review the full position description with all job duties under the “Featured Job Opportunities” on the University Advancement recruitment website: <https://advancement.wm.edu/come-work-with-us/open-positions/index.php>

Required Qualifications

- HS Graduate or equivalent.
- Commitment to diversity, equity and inclusiveness, including but not limited to collaboration, staffing and programming.
- Experience working in an administrative support role (typically 1+ years) in a fast-paced office.
- Outstanding interpersonal, verbal and written communication skills, with the proven ability to work collaboratively as a team player as well as develop and foster communication and teamwork with a diverse audience including alumni, donors, faculty, staff, students and the university community.
- Excellent problem-solving skills, with demonstrated ability to work independently, taking an appropriate level of initiative, to interpret, apply and explain policies and procedures, think strategically and exercise sound judgment when making logical, defensible decisions.
- The ability to proactively manage a large office, using successful office practices and protocols to maintain efficient and effective office operations, identify areas of improvement and anticipate the needs of the office, keeping it well-stocked, organized, and attractive. Proficiency with Microsoft Office Suite (Word, Excel, PowerPoint, Outlook) with moderate proficiency in PowerPoint, Acrobat Pro and/or similar programs and the ability to learn development and design-related software.
- Commitment to excellence and accountability, with the ability to multi-task, work independently and collaboratively while exercising sound judgment and taking an appropriate level of initiative.
- Strong organizational skills with the ability to manage multiple and competing tasks concurrently.
- Understanding of and desire to make an impact on the future of higher education

Preferred Qualifications

- Bachelor’s degree.
- Experience working in higher education, fundraising or other membership-based nonprofit (typically 3+ years).
- Administrative experience in support of an agency or department head to include event or meeting coordination/planning, advisory board support, coordinating travel logistics, and experience with fiscal support administration (i.e. budget operations, processing invoices, reimbursements, reconciliation) (typically 3+ years).
- Experience in a customer service role with the ability to interact professionally with VIPs, donors, volunteers, etc.
- Experience using a CRM (typically 1+ years).
- Experience with fiscal support administration (i.e processing invoices, reimbursements, reconciliation).
- Working knowledge of Commonwealth of VA State and University policies and procedures.

- Strong administrative skills with demonstrated proficiency in creating, proofreading, and editing complex documents with careful attention to detail, accuracy, and deadlines.
- Strong analytical skills with the ability to extract and analyze data and produce reports in a variety of formats. Experience with marketing initiatives and other efforts to generate leads, including assisting with preparing and designing materials (hard-copy and electronic) for donors.
- Experience with updating and maintaining websites using Cascade or similar tools.

Conditions of Employment

- This is a non-exempt position, eligible to receive overtime in accordance with the Fair Labor Standards Act.
- This position may be subject to overtime during high peak times, etc. as directed and approved by the supervisor.

Job Duties

University– 80%

All work below is related to the support for work, gifts and/or communication about gifts that will support the university.

Administrative Support to the Assistant Vice President for Principal Gifts & Gift Planning, 30%

- Serve as primary administrative support for the Assistant Vice President and work closely and collaboratively with the President's and Vice President's Offices and with other key areas of campus as needed.
- Collaborate with the Administrative Coordinator for Principal Gifts & Foundation Operations to cover office projects, business needs and operations in support of the Assistant Vice President, as needed.
- Manage and maintain the Assistant VP's calendar including the management of meeting requests and coordinating the participation of others for all aspects of individual and group meetings. Conduct research and gather all necessary information prior to meetings and events and prepare briefing materials/agenda for AVP. Work directly with staff across campus to schedule meetings, obtain and/or disseminate information. Determine need for and arrange meetings and agendas for various internal and external constituents.
- Manage schedule and coordinate travel in support of fundraising work of the Assistant VP in a timely and accurate manner. Prepare travel materials, prepare expense reports and reimbursements, enter contact reports and implement reminder system as needed.
- Assist with the Assistant VP's donor portfolio to include management, tracking, research and data accuracy in collaboration with the prospect development team.
- Review, prioritize and determine actions for all incoming correspondence. Research and draft responses. Research, prioritize and follow up on incoming issues and concerns addressed to the AVP, including those of a sensitive or confidential nature. Determine appropriate course of action, referral, or response.
- Draft correspondence and stewardship initiatives for Boyle Legacy Society members and prospects.
- Research information and prepare presentation materials as needed. Run reports and prepare and analyze data for the Assistant VP and university leadership as needed.

- Coordinate with the Assistant VP to plan and implement team meetings and retreats to include agenda, securing space, lining up speakers, arranging meals/activities. Represent the Assistant VP at various internal meetings as needed.
- Provide support for all personnel searches (including travel arrangements/expense reimbursements for non-local candidates). Oversee orientation/on-boarding process for new employees, including meeting schedules.
- Perform other related duties as assigned.

Administrative Support for the Department, 25%

- Manage and maintain departmental calendar ensuring the management of meeting requests and coordinating the participation of others for all aspects of individual and group meetings, retreats and workshops.
- Coordinate aspects of department travel including transportation and accommodation arrangements, travel materials, and processing required forms and reimbursements.
- Maintain data and donor file integrity (electronic and hard copy files and filing) to include correspondence, budget records, and contractual agreements using best practices for file management. Ensure data integrity and respond to departmental requests.
- Directly manage the department operating budget, including budget reporting and reconciliation, invoice and reimbursement processing, and posting of financial transactions. Develop budget forecasts and annual FY budget reviews.
- Communicate procedures to staff members to ensure timely payments to vendors and suggests new procedures to enhance budgeting process. Maintains central office files that include budget reports, past and present.
- Oversee daily tasks, coordinate workflow activities and ensure office is functioning effectively to support the work of the team.
- Maintain inventory of all general office supplies and submit orders for necessary items.
- Collaborate with the Administrative Coordinator for Principal Gifts & Foundation Operations and the gift planning team to cover office projects, business needs and operations as needed.

Support of Special Projects Assigned to Members of the Team 25%

- Assist with marketing initiatives and other efforts to generate leads, including assisting with preparing and designing materials (hard-copy and electronic) for donors.
- Prepare monthly birthday, anniversary, and holiday cards for Boyle Legacy Society members and individuals included in team members' portfolios and coordinate timely mailing.
- Collaborate with project/group administrator to support projects and the group.
- Maintain & update data on the website.
- Perform other related duties as assigned.

William & Mary Foundation – 20%

All work below is related to the support for work, gifts and/or communication about gifts that will support the Foundation

- Assist with overall stewardship initiatives, including Boyle Legacy Society events, and other offerings for donors across Advancement, including for VIP relationships.
- Assist with the preparation of correspondence to donors and advisors as it relates to estate administration, life insurance, 50th Reunion, special projects and general outreach.
- Manage and maintain the Assistant VP's calendar including the management of meeting requests and coordinating the participation of others for all aspects of individual and group meetings. Conduct research and gather all necessary information prior to meetings and events and prepare briefing materials/agenda for AVP.
- Manage schedule and coordinate travel in support of fundraising work of the Assistant VP in a timely and accurate manner. Prepare travel materials, prepare expense reports and reimbursements, enter contact reports and implement reminder system as needed.
- Assist with marketing initiatives and other efforts to generate leads, including assisting with preparing and designing materials (hard-copy and electronic) for donors.

Equal Opportunity Statement

William & Mary values diversity and invites applications from underrepresented groups who will enrich the research, teaching and service missions of the university. The university is an Equal Opportunity/Affirmative Action employer and encourages applications from women, minorities, protected veterans, and individuals with disabilities.

Background Check Statement

William & Mary is committed to providing a safe campus community. W&M conducts background investigations for applicants being considered for employment. Background investigations include reference checks, a criminal history record check, and when appropriate, a financial (credit) report or driving history check.

Benefits Summary Statement

William & Mary offers our employees a full array of benefits including retirement, health insurance with options for expanded dental and vision along with group and optional life insurance with coverage for spouse and children, flexible spending accounts, and an EAP (Employee Assistance Program).

Our employees enjoy additional university benefits such as educational assistance, professional development, wellness benefits, and a robust holiday schedule. All employees have access to fitness facilities on campus. Staff members also have access to the university libraries, and much more. To learn more, go to: <https://www.wm.edu/offices/hr/currentemployees/benefits/index.php>.



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In addition to salary, William & Mary provides wonderful benefits and perks that add to an employee's total compensation package. Below is a comprehensive overview of benefits for the **Administrative Coordinator for the AVP of Principal Gifts & Gift Planning** with the top salary of **\$50,000, commensurate with experience**. This position is classified as operational which defines the benefits package.

HEALTH & LIFE

employees, we have multiple health insurance plans to attend to our employees' health needs. The Commonwealth's Department of Human Resources Management (DHRM) administers all plans. For in-depth descriptions and cost of premiums for each plan, including optional buy-ups, visit [DHRM's Health Benefits website on plan choices](#). *New employees are required to make health coverage selections within 30 calendar days of hire date.*

Optional Life Insurance For benefits-eligible employees, a group life insurance policy is provided for you. The amount is equal to your annual salary rounded to the next highest thousand (when applicable), and then doubled. This is a double indemnity policy that would pay twice the value of the insurance in the event of an accidental death. .

Long Term Care Insurance The Virginia Retirement System (VRS) has contracted with Genworth Life Insurance Company to offer Long-Term Care Insurance to Commonwealth of Virginia employees. Coverage is participant-paid (directly billed to employees and not payroll deducted) for a monthly benefit allowance of covered long-term care expenses.

TIME OFF

In addition to 12 paid holidays per year, you will accrue between 12 and 27 days per year of **annual leave**, which may be used however you wish, including vacations and other personal purposes, or to cover other kinds of leave for which you have zero balance.

A benefit unique to William & Mary eligible employees is an additional 16 hours of paid leave per year for **community service leave**, for services within their communities through school assistance or as a volunteer member of a community service organization, so you can get out there and be a part of the broader community.

RETIREMENT

In addition to Social Security, contributions will be made for you to a Virginia Retirement System (VRS) plan. The VRS plan that you are eligible to participate in is based on your hire date.

VRS Hybrid Plan (for employees hired on or after January 1, 2014 with no prior state service)

This is a combination of a defined (or fixed) benefit retirement plan and defined contribution (or 401k-like) plan. Members must have at least five years of service and have attained age 60 to retire early with reduced benefits. To receive full benefits, the member must be of social security age and have at least five years of service credit or when age and service credit equal at least 90. The benefits received under the defined benefit portion of the plan are determined by salary, length of service, age at retirement, and the retirement income option selected (e.g., survivorship, partial lump-sum optional payout). The benefits received under the defined contribution portion of the plan are determined by the contribution level and fund performance over time. More information about the [VRS Hybrid Plan](#) can be obtained at the VRS website.

ADDITIONAL PERKS

In addition to the perk of living in Williamsburg, close to beautiful parks, nature trails, fabulous shopping, Second Sundays on Merchant's Square, farmer's markets and more, William & Mary employees enjoy these additional perks.

EMPLOYEE EDUCATIONAL ASSISTANCE

The [Educational Assistance Policy](#), permits eligible faculty and staff who participate in the VRS or ORP retirement program to take advantage of educational opportunities. Participation in the program is by approval only. An eligible employee may be approved to enroll in an academic credit course of instruction at William & Mary and have the current tuition paid for or waived within the terms of the policy. An eligible employee may also be approved to enroll in an academic credit course of instruction at an institution other than William & Mary and have the current tuition reimbursed under the terms of the policy, provided the courses are not offered at William & Mary and are directly related to the employee's job.

AFLAC

Employees can choose from different optional policies for coverage such as cancer insurance, intensive care insurance and disability, etc. These are optional plans. For additional information please call 1-800-992-3522 or visit [AFLAC](#) on the web.

DISCOUNTS

W&M ID Card Local Discounts: Employees can use their ID card at participating local vendors in the Williamsburg area to receive discounts on meals, lodging and purchases.

Colonial Williamsburg Collegiate Pass: W&M employees are eligible for a discounted Colonial Williamsburg Collegiate Pass, which includes the use of Colonial Williamsburg's bus system and admission into any of the exhibits in the restored area. Present your W&M ID at the Colonial Williamsburg Visitor's Center or ticket offices to get your discounted pass.

Statewide Discounts: [DHRM List](#) information is online.

OTHER GREAT PERKS

Use of W&M Facilities: Many university facilities, including the [recreational facilities](#) and [the libraries](#), as well as [fitness classes](#), are available to employees. Contact specific facilities for details.

SunTrust Bank: SunTrust Bank provides benefits to William & Mary employees. For questions and assistance, please contact your local Jamestown Road SunTrust Branch (1186 Jamestown Road, Williamsburg, VA 23185) at 757-603-4749.

Child Care: [Williamsburg Campus Child Care](#) (WCCC) is a nonprofit organization which has had a successful program in Williamsburg since 1981.

CommonHealth: [CommonHealth](#) of Virginia offers programs available to all full-time William & Mary employees and dependents.

Legal Resources: [Legal Resources](#) is a program that allows employees to pay \$16.50 per month for legal services. Visit the website to learn more.