



Assistant Director of Finance & Operations, Alumni Engagement/WMAA

Mission Statement

Through our efforts to build a robust and inclusive culture of engagement and philanthropy, University Advancement strengthens connections between William & Mary and our vibrant community to ensure that the university and its people thrive for all time coming. By fostering lifelong relationships and creating meaningful opportunities, the team enriches the quality of the William & Mary experience and propels the university forward to address the most pressing needs of our time.

Position Summary

The Assistant Director of Finance & Operations, Alumni Engagement/WMAA (Assistant Director) is an integral member of the Alumni Engagement team in support of the W&M Alumni Association business operations in the Office of University Advancement at William & Mary.

The Assistant Director reports to the Director of Budget & Finance and is responsible for overseeing key business functions that support the operations of the W&M Alumni Association. Key responsibilities and duties include:

- Overseeing appropriate depositing and reporting of revenue and gifts; managing endowment drawdowns, reporting, and reconciliation.
- Day-to-day financial operations, including but not limited to invoice processing, bank deposits, expense report processing, check generation, and general ledger/journal entries.
- Accurate and timely financial record-keeping.
- Business/purchase order workflow and approval oversight.
- Fixed assets management and inventory in collaboration with Alumni Engagement facilities staff.
- Training staff on WMAA business operations, including standard operating procedures and related operations software systems.
- Creating and maintaining standard operating procedures and resource manuals for WMAA staff.

One of the university's core values is belonging, and the Assistant Director will help foster a community that embraces diverse people and perspectives. The Assistant Director will be a proactive and collaborative member of this dynamic team as William & Mary builds on its success through its strategic plan, Vision 2026, and continues planning for its next campaign.

This position is based in Williamsburg and is expected to work in the office on campus, eligible to work remotely up to two days per week.

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

- Bachelor's degree.
- Commitment to diversity, equity, and inclusiveness, including, but not limited to, collaboration, staffing and programming.
- Experience with business office management procedures and practices.
- Experience with financial accounting or bookkeeping in accounts payable and receivables and reconciling data. (Typically 3+ years)
- Proficiency in the Microsoft Office Suite and familiarity with an automatic accounting system and databases.
- Excellent oral and written communication skills, with the ability to communicate effectively, using discretion and tact in all interactions.

Preferred Qualifications

- Bachelor's degree in Accounting, Finance or Business Administration.
- Knowledge of Workday module or Sage Intacct software.
- Knowledge of Blackbaud Customer Relationship Management (CRM) platform or similar CRMs.
- Experience using an automatic accounting software program. (Typically, 3+ years)
- Familiarity with nonprofit operations and/or the Commonwealth of VA policies and procedures.
- Experience in higher education and/or nonprofit engagement.

Conditions of Employment

- This is an exempt position, not eligible to receive overtime in accordance with the Fair Labor Standards Act.
- This position is subject to extended working hours during periods of peak business operations, including but not limited to fiscal year end and audit planning and fieldwork

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/uhr/benefits/index.php?type=none>.

Job Duties

Financial Operations 40%

- Oversee accounts payable and accounts receivable for WMAA.
- Process accounts payable transactions in compliance with financial policies; verify, classify and record accounts payable data into accounting system; coordinate monthly credit card reconciliation process with departmental credit card holders; generate invoices on behalf of team.
- Manage reconciliation and reporting of all revenue producing activity for the WMAA and post to the general ledger, including gift shop sales, event registrations, Alumni House rentals, commissions, and Alumni House tailgates.
- Partner with Alumni Engagement facilities staff to maintain fixed assets documentation.

Departmental Training and Project Management, 25%

- Create and maintain departmental standard operating procedures for financial operations.
- Train new staff on Alumni Engagement operations systems during onboarding; provide office hours for current staff.
- Partner with team leads on budgets for non-capital-level projects, initiatives, and events.
- Curate finance and operations resource repository for staff.

Process Gifts and Donations, 25%

- Maintain Alumni Association digitized donor files, digitized donations, sponsorships and charitable giving files.
- Process donations/sponsorships and provide digital copies to the Office of Gift Accounting and reconcile donor reports with Association records.

Finance & Operations Office Management, 10%

- Oversee VA/federal tax and registration to solicit payments, submissions, and documentation.
- Manage W9s, 1099s, and other financial documents as needed.
- Serve as PCI Merchant Manager for WMAA.



WILLIAM & MARY

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

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 **Assistant Director of Finance Operations, WMAA** with the top salary of **\$57,000**. This position is classified as professional which defines the benefits package.

HEALTH & LIFE

Our **health plan options** are designed to support a healthy lifestyle for you and your family. You may enroll in a statewide health plan, regional plan, or, if living or working in the Hampton Roads area only, a health maintenance organization (HMO). Full-time employees pay the employee portion of the total monthly premium, and the state pays the remainder of the cost, anywhere from \$584 to \$1,802 per month depending on the employee's plan; premiums are deducted from paychecks before taxes are paid.

Group life insurance policy is also 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.

Employees are covered by one of two disability plans: University Sick & Disability Plan (university plan) or Virginia Sickness and Disability Program (VSDP).

University Sick & Disability Plan provides 100% pay for 120 calendar days for you if you experience an illness, surgery or accidental injury that requires you to be absent from work more than seven calendar days. Each July, 30 days of short-term disability are restored. A long-term disability plan is available for an additional cost.

The Virginia Sickness and Disability Program (VSDP) provides 60% pay up to six months for you if you experience an illness, surgery or accidental injury that requires you to be absent from work more than seven calendar days. This percentage increases after five years of service. A **long-term disability** plan is also available at no cost to you. This provides you with 60% preinjury salary.

TIME OFF

In addition to 12 paid holidays per year, William & Mary offers several leave programs. You will accrue 24 days per year of **annual leave**, which can be used for personal time, vacation, and sickness. Employees also accrue 4 - 8 days of **sick leave** to be used if you are sick or injured, or for medical appointments.

A benefit unique to William & Mary eligible employees is an additional 16 hours of paid leave per year for **community service leave**, so you can get out there and be a part of the broader community.

RETIREMENT

All salaried and benefits-eligible employees can choose to participate in the state retirement plan (VRS) or the Optional Retirement Plan (ORP). VRS contains both a pension benefit with 100% vesting after 5 years of employment and a defined contribution component with William & Mary contributing up to

3.5%. With ORP, vesting is immediate and is solely a defined contribution plan in which William and Mary is contributing 8.5% of your salary.

Take advantage of any or all our optional 403(b) and 457 savings programs offering pre-tax savings or Roth after-tax deferrals. Contribute up to the IRS-determined limit annually in each account and receive a 50% match from William & Mary for up to \$20 per pay period.

ADDITIONAL PERKS

EMPLOYEE EDUCATIONAL ASSISTANCE

Under the [Educational Assistance Policy](#), faculty and staff who are eligible for retirement participation may be eligible to enroll in certain academic credit courses at William & Mary and have the current tuition paid or waived for up to 6 credit hours each semester and during summer session (all summer sessions combined). Some restrictions do apply. In certain cases, an employee may be approved to enroll in an academic course at an institution other than William & Mary and have the current tuition reimbursed. If you have questions after reading the policy, please contact the Tax Compliance Office at Tax@wm.edu.

AFLAC

Employees can choose from different optional policies for coverage such as cancer insurance, intensive care insurance, disability insurance, etc. These are optional plans. More information about AFLAC can be found on the [AFLAC](#) website.

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

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.