

# WILLIAM & MARY

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## UNIVERSITY ADVANCEMENT

### Director, Gift Planning Development

#### Mission Statement

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

The William & Mary Foundation advances the university's highest aspirations by securing private support, guiding a multi-asset investment portfolio and offering strategic leadership. In this work, we propel the university toward national preeminence and help shape a future worthy of its history.

Consistent with the university's shared services agreement with the William & Mary Foundation (WMF), this position is assigned 50% effort to support Foundation Services, LLC, a subsidiary of the WMF, with the responsibilities outlined below.

#### Position Summary

The Director of Gift Planning Development is a key position in the gift planning office in the Office of University Advancement at William & Mary.

As a primary point of contact and resource for donors, colleagues, and professional advisors, the Director will assist in drafting complex gift agreements, suggested language, and gift illustrations for the benefit of the university and its related programs and foundations. This position is responsible for the development and cultivation of all gifts from wills, trusts, retirement plans, and life income vehicles, and meeting reporting, auditing, and pipeline development needs in addition to overseeing the management of tangible gifts donated to the university. The Director also leads internal reporting, summaries, and updates related to planned gifts to the university.

The Director reports to the Executive Director of Gift Planning and supervises the Associate Director of Gift Planning Administration. The Director will help foster a culture of belonging that provides opportunity for all people and perspectives. This is a hybrid position based in Williamsburg, VA, that offers a flexible work environment.

Learn more about University Advancement and view the full position description for this job on the University Advancement recruitment website: <https://advancement.wm.edu/come-work-with-us/open-positions/index.php>.

## Required Qualifications

- Bachelor's degree and substantive experience or specialized expertise in gift planning at a university or large nonprofit organization.
- Experience assisting donors and their professional advisors choose the best combination of assets and gift vehicles to accomplish their charitable, financial and estate planning objectives.
- Demonstrated professional experience in gift planning development and advancement in higher education or a large nonprofit organization
- Understanding of complex charitable gift vehicles and giving strategies: estates and trusts, charitable gift annuities, charitable remainder trusts, charitable lead trusts, gifts of real estate, gifts of closely held securities, gifts of life insurance, bargain sales, tangible and intangible gifts, and charitable distributions from retirement plans.
- Ability to prepare and present customized gift illustrations of deferred or complex gifts, customized suggested testamentary language, and complex legal language for specific endowment agreements or letters of designation.
- Ability to review estate and trust documentation to confirm that future commitments conform with gift acceptance policies and best practices for counting gifts to campaign and fundraising totals.
- Skills to present planned giving information to both lay and professional audiences in a way that will inspire philanthropy.
- Excellent interpersonal and communication skills, with the proven ability to work effectively with a diverse constituency and collaboratively with colleagues from across the institution, while exercising discretion and diplomacy in all interactions.
- Strong project coordination and organizational skills with the ability to balance competing priorities and complex situations within tight deadlines in a team oriented environment.
- Willingness and ability to work outside normal working hours when necessary.

## Preferred Qualifications

- Juris Doctor (JD) degree from an accredited law school
- Demonstrated skills to work effectively with colleagues and donors as well as their professional advisors in a college or university setting to finalize planned gifts.
- Experience collaborating with campus-wide development professionals.
- Management skills to educate, lead and inspire fundraising professionals and other team members.

- Demonstrated communication skills (preparing proposals, gift calculations/illustrations - and other written materials), and skills to be diplomatic with diverse constituencies including professional colleagues, donors' professional advisors, and donors and their families.

## **Conditions of Employment**

- This position may require additional hours beyond the typical work hours to include evenings and weekends.

## **Job Duties**

### **Pipeline Development and Gift Recording, 55%**

- Work with frontline fundraisers to identify, cultivate, finalize and record planned gifts to the fundraising totals.
- Complete monthly gift planning entries to record revocable deferred commitments to the campaign totals.
- Assist frontline fundraisers working with donors to document planned gifts.
- Draft documentation necessary for finalizing and recording planned gifts. This documentation includes suggested will or trust language, designation paperwork, gift illustrations, trust and annuity agreements, and valuation letters.
- Track pending planned gifts and assist in moving the gifts through the giving pipeline from prospective to finalized gifts.
- Identify additional planned giving prospects and collaborate with frontline fundraisers to finalize commitments to add to the fundraising totals.

### **Portfolio Development and Management, 30%**

- Qualify, build, and manage a small portfolio of prospects through all stages of the donor cycle, including discovery (qualification), cultivation, solicitation and stewardship. The portfolio managed by this position will not require travel outside of the Hampton Roads area.
- Acknowledge gifts in timely and appropriate ways and assist with stewardship efforts for gift planning donors.
- Capture and record work in CRM platform for University Advancement and update internal departmental systems as needed.

### **Data Management and Industry Standards, 10%**

- Oversee the highest standards of document retention and record keeping are maintained through use of University Advancement CRM, digital files, and paper files.
- Remain current on relevant activity and trends in gift planning, financial and estate planning, federal tax law and regulations that govern charitable giving, new services offered by other non-profit groups and organizations, and provide updates to colleagues about legislative changes when necessary.

#### **Performance Management – 5%**

- Ensure performance expectations are clear, effectively communicated, and relevant to the goals and objectives of the Employer Development and Engagement unit and Office of Career Development & Professional Engagement.
- Provide all staff frequent, constructive feedback, including interim evaluations as appropriate.
- In collaboration with staff, design professional development plans to assure staff have the necessary knowledge, skills, and abilities to accomplish duties and goals.
- Verify that the requirements of the performance planning and evaluations system are met and that evaluations are completed by established deadlines with proper documentation.
- Train, supervise and oversee the efforts of the Gift Planning Administrator who maintains and updates existing gift planning records, handles estate and trust distributions to the university or its related foundations, maintains the probate database, and assists with the processing of routine tangible and life insurance gifts.

#### **Equal Opportunity Statement**

EEO is the Law. Applicants can learn more about William & Mary's status as an equal opportunity employer by viewing the "Know Your Rights" poster published by the U.S. Equal Employment Opportunity Commission. <https://www.eeoc.gov/know-your-rights-workplace-discrimination-illegal>

#### **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.

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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 Director, Gift Planning Development with a top salary of \$110,000 commensurate with experience.** 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

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

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](mailto:Tax@wm.edu).

## 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.