



OFFICE OF UNIVERSITY ADVANCEMENT



### Director of Foundation Operations

#### **Mission Statement**

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

The William & Mary Foundation (WMF) 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 80% effort to support WMF with the responsibilities outlined below.

#### **Position Summary**

The Director of Foundation Operations is a leader with the William & Mary Foundation.

The Director of Foundation Operations reports to the Executive Director of the W&M Foundation and is primarily responsible for Foundation Board management and administration..

Along with the Executive Director, the Director serves as a key point of communication to the Trustees, manages communications related to Board activities internally and externally, and serves as staff liaison for one or more committees, among other high-level support for the Foundation. The Director also provides key logistical and operational support to the Foundation's subsidiaries, including the William & Mary Real Estate Foundation, the William & Mary Athletics Foundation, and the Murray 1693 Scholars Foundation.

The Director will help foster a community that embraces all people and perspectives and will be a proactive and collaborative member of this dynamic team.

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 or the equivalent combination of education, professional experience and specialized expertise.
- Understanding of philanthropy in higher education and the impact it has on the future of higher education.
- Commitment to the university's values of belonging, curiosity, excellence, flourishing, integrity, respect, and service, including, but not limited to, collaboration, staffing and programming.
- Experience (typically 3-5+ years) managing and developing relationships with constituents, clients, or customers. Examples include outside sales, marketing or public relations, financial planning or wealth management, admissions or enrollment, and membership development, as well as academic fundraising or alumni engagement, and board management experience.
- Exceptional interpersonal, written and oral communication skills with fluency in using persuasive language to promote visionary opportunities.
- Demonstrated meticulous organizational skills with the proven ability to exercise sound judgement and solve problems independently.
- Proven leadership skills and familiarity with project management principles to include managing people, timelines and budgets. Proficiency with a variety of software applications to include MS Office (including PowerPoint and Excel), databases, and reporting tools. Familiarity with website development software (such as Pages).
- Ability to read and interpret financial statements, budgets, and other fiscal reports.

## **Preferred Qualifications**

- Familiarity with and/or affinity for William & Mary and higher education.
- Knowledge of fundraising databases.
- Understanding of university fundraising and best practices in stewardship and donor relations.
- Experience in a non-profit fundraising environment.
- Experience in program or project planning.
- Progressively responsible experience managing and developing relationships with constituents, clients, or customers, in a for-profit or nonprofit setting, with the ability to innovate, implement dynamic change and exceed goals.
- Experience with best practices for governance or fiduciary and volunteer boards.
- Experience in high-level support of a board or committee.
- Previous experience in meeting/event planning, coordination, and execution.

## **Conditions of Employment**

- This position is expected to work additional hours beyond the typical work week to include evenings and weekends.
- Must have the flexibility and ability to travel as required.
- Ability to work with highly confidential materials and use discretion and sensitivity at all times.

**Is the position remote work eligible?** No

## **Position Duties**

### **Foundation Board Management and Administration, 80%**

- Partner with the Executive Director of WMF to set programmatic direction and execution of 3 annual WMF meetings.
- Personally visit new and retiring trustees to conduct onboarding training and interviews in partnership with the Executive Director.

- Along with the Executive Director, serve as key point of communication to the Trustees.
- Plan, execute, and manage communications related to Board activities internally and externally.
- Develop and execute effective trustee engagement strategies.
- Serve as staff liaison for one or more committees. Serve as the Project Manager for the committees to ensure that the responsibilities and tasks of the committee are accomplished to include plans for the on-boarding and education of new trustees. Manage and execute the mentor program for new trustees.
- Develop and maintain a strong pipeline of potential nominees that fit both the goals and requirements of the WMF, W&M Real Estate Foundation, W&M Athletics Foundation, and Murray 1693 Scholars Foundation.
- Develop and execute effective trustee engagement strategies for each trustee, designed to leverage activity in the most strategic manner. Regularly identify new and existing engagement opportunities to advance volunteer leaders through consecutively meaningful and important roles.
- Ensure adherence to Foundation bylaws and policies and other governance documents
- Manage and oversee legal compliance tasks such as Conflict of Interest reporting, SCC filings etc.
- Develop, implement, and analyze trustee assessments, and make recommendations based on results.
- Plan and execute weekly communication strategy for trustees regarding News of Interest and semi-annual newsletters to Emeritus Trustees.
- Work closely and collaboratively with the President's Office, CEO's Office, CFO's Office, Events, other key areas of campus and Executive Director to plan Foundation meetings and support the work of the Foundation's committees.
- Serve as the key point of communication with Trustees, administration and staff who work with Foundation, including planning and producing correspondence.
- Collaborate with key stakeholders to produce committee agendas, meeting minutes and materials, and Foundation materials and collateral, manage content of restricted access and public website for Foundation trustees.
- Suggest potential prospects for trustee and advisory boards. Along with the Executive Director, provide logistical and operational support to the Foundation's subsidiaries, including the William & Mary Athletics Foundation, the William & Mary Real Estate Foundation, and the Murray 1693 Scholars Foundation.
- Oversee all staffing for the Foundation meetings and events, including collaboration with Advancement Events, outside vendors, and additional colleagues.
- Other duties and special projects as assigned.

#### **University Advancement Support, 20%**

- Serve as a representative of William & Mary, and develop a working knowledge of the university's goals, priorities and programs.
- Support the mission of the Office of University Advancement by engaging with fundraising initiatives, events, and campaign projects as needed.
- Collaborate with gift officers and other staff in support of Foundation trustees.

#### **EEO 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. To learn more, go to: <https://www.wm.edu/offices/uhr/benefits/>



# 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 **Director of Foundation Operations** position, with the salary of **up to \$100,000 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

### 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, disability insurance, etc. These are optional plans. More information about AFLAC can be found on the [AFLAC](#) website, or you may contact Brad Klavan at [Bradford\\_Klavan@us.aflac.com](mailto:Bradford_Klavan@us.aflac.com), or 757-652-0912.

### 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.