

WILLIAM & MARY

UNIVERSITY ADVANCEMENT

Executive Assistant to the W&M Foundation Chief Financial Officer and Assoc. Vice President for Advancement Services & Innovation

Unit Mission Statement

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

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 WMF with the responsibilities outlined below.

Position Summary

The Executive Assistant to the Chief Financial Officer and Associate Vice President for Advancement Services & Innovation (AS&I) is the senior administrative professional supporting a dual-hatted executive with enterprise-wide responsibilities spanning foundation financial operations, governance, real estate, compliance, advancement services business services & operations, and organizational strategy.

This role serves as a trusted strategic partner, providing high-level administrative, financial, and operational coordination that enables the CFO/AVP to focus on leadership, strategy, stewardship, and institutional priorities. The Executive Assistant manages complex calendars and travel, supports Foundation board and committee activity, coordinates across Advancement and Foundation teams, and ensures the smooth execution of executive-level operations with discretion, accuracy, and professionalism.

The position interacts regularly with senior university leadership, Foundation board members, external partners, auditors, investment managers, and University Advancement leadership. Assisting the CFO in his broad responsibilities in support of the Foundations full corporate structure, including the 1693 Management Company LLC, Murray Scholars Foundation, W&M Real Estate Foundation, W&M Athletics Foundation, Innovations Foundation, and Foundation Services LLC. The Executive Assistant also acts as the administrative hub for the larger Advancement Services & Innovation team, which includes Gift & Records Administration, Prospect Management & Research, Advancement Information Services, Talent Engagement, and Advancement Operations.

The Executive Assistant 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 or equivalent combination of education, training, and experience.
- Significant senior-level executive administrative experience. (typically 10+ years)
- Demonstrated experience managing complex calendars, travel, meetings, and executive communications. (typically 10+ years)
- Experience with financial or budgetary administrative support (invoices, reimbursements, reconciliation).
- Exceptional organizational, time-management, and problem-solving skills.
- Strong written and verbal communication skills with meticulous attention to detail.
- Proven ability to handle confidential information with discretion and sound judgment.
- Advanced proficiency in Microsoft Office (Outlook, Word, Excel, PowerPoint) and related systems.
- Ability to work independently, manage competing priorities, and collaborate across teams.

Preferred Qualifications

- Experience in higher education, foundations, or complex nonprofit organizations.
- Familiarity with board governance processes and executive-level reporting.
- Experience with financial systems, procurement platforms, or CRM environments (e.g., Workday, Blackbaud, Salesforce).
- Significant senior-level executive administrative experience supporting C-suite or equivalent leadership.
- Knowledge of Commonwealth of Virginia or public university policies and procedures.
- Certification as an administrative professional (CAP, PACE, or similar).

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.

Position Duties

Executive & Strategic Administrative Support (30%)

- Ensure the smooth and efficient operation of the CFO/AVP's office, anticipating needs and proactively managing priorities.
- Serve as a primary point of contact for internal and external stakeholders, exercising judgment, diplomacy, and confidentiality.
- Draft, edit, and format executive correspondence, briefings, presentations, and reports.

- Assemble, organize, and report information to facilitate decisions by the CFO/AVP through research and collaboration with key stakeholders.
- Track follow-ups, action items, and deadlines across multiple initiatives and governance bodies.
- Support special projects, strategic initiatives, and cross-functional work led by the CFO/AVP.

Calendar, Meeting & Board Coordination (25%)

- Manage a highly complex executive calendar across Foundation, university, and Advancement commitments.
- Coordinate meetings with senior leadership, board members, auditors, investment partners, consultants, and Advancement leaders.
- Prepare agendas, briefing materials, and presentations, coordinate logistics, rooms, catering, and technology.
- Support Foundation and related board and committee meetings, including preparation of materials, meeting logistics, and follow-up documentation.
- Attend meetings as appropriate, capture notes and track action items.

Financial, Budget & Expense Administration (15%)

- Provide administrative support for Foundation and AS&I budget processes, including expense tracking and reporting.
- Prepare and reconcile expense reports, invoices, reimbursements, and purchasing requests for the CFO/AVP and act as the procurement lead for all areas of AS&I.
- Coordinate with Foundation Accounting, University Finance, Procurement, and external vendors as needed.
- Assist with preparation of budget summaries, forecasts, and executive-level financial materials.

Travel & Logistics Management (15%)

- Manage all executive travel planning, including complex multi-day itineraries and advance scheduling.
- Coordinate with the President's Office, University Advancement, and Foundation partners for joint travel and events.
- Prepare and submit travel authorizations and reimbursements and track related documentation for CFO/AVP travel and act as the administrative travel lead for all of AS&I.

Information, Records & Workflow Management (12%)

- Maintain organized and secure electronic and physical filing systems for executive, financial, and governance records.
- Manage confidential and sensitive information with the highest level of discretion.

- Coordinate workflows across the Foundation and Advancement Services & Innovation units to ensure continuity and responsiveness.

Front Desk Supervisor Coverage and Collaboration (3%)

- Serve as secondary back up to the Front Desk Supervisor for Discovery I.
- Maintaining the highest standards of professionalism and customer service for the office in our interactions with our constituents and support for senior leadership and all office functions, including business operations, staff engagement, executive administrative support and emergency response management.
- Assist with identifying and scheduling coverage with other members of the administrative support team when unable serve in this capacity.

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 Executive Assistant to the CFO & AVP with the top salary of **\$75,000, commensurate with experience**. This position is classified as operational which defines the benefits package.

HEALTH & LIFE

Our **health plan options** are designed to support a healthy lifestyle for you and your family. As state employees, we have multiple health insurance plans to tend 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 12 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

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 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.