



WILLIAM & MARY

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

Assistant Director, Gift Acceptance and Special Projects

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’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 50% effort to support Foundation Services LLC, a subsidiary of WMF, with the responsibilities outlined below.

Position Summary

The Assistant Director, Gift Acceptance and Special Projects reports to the University Recording Secretary in the Office of University Advancement. Under the direction of the University Recording Secretary, this position is responsible for assisting in the management of the university’s gift compliance strategy, donor agreement process, and development operations and policies.

The Assistant Director works collaboratively with diverse departments both within University Advancement and the University at large. This role will also execute periodic compliance reviews of restricted funds (endowed and current use) to ensure that gifts are spent according to donor’s intent. In addition, this position is a central point of gift agreement creation and management of gift approvals.

Other Responsibilities include (but not limited to):

- Conduct research as assigned in response to ad-hoc questions pertinent to existing gift fund purposes and restrictions.
- Carefully research and analyze archive documents utilizing all resources available including paper files, online resources and personal interviews to gather more information, including the conceptualization and implementation of search strategies.
- Draft and track donor commitments and agreements.
- Assist in the vetting of new gift restrictions.
- Maintain central access point for supporting documentation and legal documents for future reference.
- Special projects as assigned, including monitoring and updating the status of building projects.

The Assistant 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.

Read more details about our team and download the full position description here.

<https://advancement.wm.edu/come-work-with-us/open-positions/index.php>

Required Qualifications

- Bachelor's degree in a related field and or the equivalent combination of education and or experience in a related field such as legal, finance, stewardship, or research
- Knowledge of principles and practices records/information management and general office administration.
- Strong analytical and synthesis skills with the ability to read and analyze complex documents, extract critical information and apply complex guidelines and procedures.
- Highly developed writing skills with the ability to prepare and edit a variety of documents in a variety of formats as well as the ability to proof read and edit documents.
- Proficiency in Microsoft Office Suite applications with strong skills in Excel and data manipulation.
- Excellent oral and written communication, listening, and interpersonal skills, with the ability to work effectively with a diverse constituency.
- Excellent work ethic and integrity with a great propensity for detail and proven accuracy in all aspects of work.
- Possess intellectual curiosity with the ability to problem solve, set priorities, think analytically and propose effective solutions.
- Excellent time management skills with the ability to handle multiple and complex tasks concurrently, while maintaining a professional demeanor especially during stressful situations.
- Ability to maintain strict confidentiality; handle sensitive information and material in a discretionary manner, while exercising diplomacy and tact when working with individuals on and off campus.
- Demonstrated ability to exercise independent initiative, sound judgment and work under minimal supervision.
- Experience in project management and records/information management.
- Experience with a broad range of research techniques, web-based research, library resources as well as paper files.
- Experience performing a variety of writing tasks in a variety of writing styles.

Preferred Qualifications

- Knowledge or familiarity with fundraising.
- Knowledge of project management software.
- Experience with legal research.
- Previous experience in higher education and/or nonprofit fundraising highly desirable.

Conditions of Employment

- This position may require additional hours beyond the typical work week.
- Flexibility is required to work occasional evenings and weekends around major deadlines.
- Must have dependable transportation.

Position Duties

Gift Compliance & Research, 40%

- Conduct research as assigned in response to ad-hoc questions from internal and external stakeholders pertinent to existing gift fund purposes and restrictions.
- Carefully research and analyze archive documents utilizing all resources available including paper files, online resources and personal interviews to gather more information, including the conceptualization and implementation of search strategies.
- Collect, synthesize and analyze research findings to produce briefings and reports in strategic and relevant ways, including creating actionable recommendations that inform decision-making.
- Maintain central access point for supporting documentation and legal documents for future reference.
- Other duties as assigned

Donor Agreement Process, 30%

- Based on research of gift compliance and regulations, compose drafts of a variety of documents, including letters of commitment, gift agreements, correspondence, etc.
- Maintain proper internal controls over the acceptance and recording of gifts and ensuring compliance with donor intent, university policies, IRS regulations, federal and state laws, FASB, GASB and CASE reporting standards, and best practices.
- Track & monitor donor commitment and agreement process ensure that they are completed in a timely manner.
- Assist in the vetting of new gift restrictions to ensure correct language is used and that donor intent can be followed.
- Provide information and or guidance to gift officers and others (with discretion), to ensure that all donor documents comply with university policies and industry standards, including CASE management and IRS guidelines on charitable giving.

Special Projects, 30%

- Create tracking system for monitoring and updating workflow and milestone status for ongoing and new building and facilities projects
- Assist in ongoing internal compliance audit for existing agreements
- Develop new and enhanced methodologies and reporting abilities for tracking and reporting gift documents.
- Other duties as assigned.

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. 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 **Assistant Director, Gift Acceptance & Special Projects** position, with the salary of **up to \$65,000 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.

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, 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.