WILLIAM & MARY

UNIVERSITY ADVANCEMENT

Director, Gift Planning Administration

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 Administration is a key position in the gift planning office in the Office of University Advancement at William & Mary.

As a primary administrative contact and resource for donors, colleagues, and professional advisors, the Director will assist in the administration of planned gifts for the benefit of the university and its related foundations. This position is responsible for administering all gifts from wills, trusts, retirement plans, and life income vehicles, and meeting reporting and auditing needs in addition to overseeing the management of life insurance policies and tangible gifts donated to the university. The Director also leads internal reporting, summaries, and updates as well as state and federal reporting and compliance requirements related to planned gifts to the university.

The Director reports to the Executive Director of Gift Planning and supervises the Gift Planning Administrator. 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.

Review and download the full position description for this job 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 and JD with substantive experience or specialized expertise directly related to the position.
- Demonstrated professional experience in gift planning administration or in the legal field as a practicing attorney in trust and estate administration.
- Skills to present planned giving information to both lay and professional audiences in a way that will inspire philanthropy.
- Understanding of complex charitable gifts and gifting 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, tangible and intangible gifts, bargain sales and gifts from retirement plans.
- Ability to review estate and trust documentation and to serve as the William & Mary liaison to coordinate with Trustees and Administrators in order to facilitate charitable distributions.
- Ability to navigate complex legal designations and relationships between separate legal entities to achieve donor intent and record gifts accurately.
- 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.

Preferred Qualifications

- Demonstrated success working effectively with donors and prospects as well as their legal and financial advisors in a college or university setting.
- Experience in a gift planning office in a university setting or larger nonprofit with experience collaborating with campus-wide development professionals.
- Management skills to educate, lead and inspire fundraising professionals and other team members.
- Demonstrated communication skills and skills to be diplomatic with a broad range of constituencies including professional colleagues, donors’ professional advisors, and donors and their families.
- Experience assisting executors and professional advisors with the administration of charitable gifts from wills, trusts, and retirement plans.

- Experience auditing estate, trust and retirement plan distributions to ensure the designated amount is received by the university.

Conditions of Employment

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

Job Duties

Estate Administration, 65%

- Administer all estate, testamentary trust, life-income gifts and retirement plan distributions for the benefit of the university and its related programs and foundations.
- Ensure the highest standards are maintained for the Gift Planning Office to serve as the administrative contact for trusts, estates, and retirement plans.
- Review testamentary documents, revise refunding bonds, review need for potential disclaimers, and coordinate review of estate planning related litigation with the Office of University Counsel and as requested by university leadership. Prepare case summaries and updates as required.
- Handle all testamentary distributions, draft posting instruction memos to Gift Accounting or Investment Management, as applicable.
- Create new accounts when necessary, create audit trail, and monitor and audit estates and trusts to protect the interests of the university and its related foundations.
- Maintain accurate records, both electronic and paper files, of testamentary distributions and deferred planned gifts and provide summary reports to the Executive Director and advancement leadership.

Compliance and Administration of Life Income Gifts, 20%

- Oversee compliance and administration of life income gifts and gift processing for all complex gifts to the university and its related foundations. This includes charitable gift annuities, charitable remainder trusts, charitable lead trusts, gifts of real estate, bargain sales, gifts of closely held securities, gifts of life insurance, tangible and intangible gifts, and charitable distributions from retirement plans:
- Coordinate with corporate trustee, donors’ professional advisors/brokers, University Counsel, William & Mary Real Estate Foundation, University Recording Secretary, Finance Office, and/or William & Mary related foundations, as may be applicable.
- Manage life insurance administration in coordination with the Gift Planning Administrator.

- Process charitable gift annuity registration and ongoing compliance with state charitable gift annuity regulations. Prepare and coordinate charitable gift annuity registration annual statements/filings in various states.
- Prepare and file IRS 8283, 8282, and 1098-C forms when required.

Data management, supervision, and industry standards, 10%

- Perform accurate data entry and file management to record realized planned gifts and produce and audit confidential specialized Gift Planning reports, including summary reports for Executive Director and key administrators.
- Remain current on relevant activity and trends in gift planning, financial and estate planning, federal tax law and regulations that govern charitable giving, and 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.

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 Administration 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.

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.