



# WILLIAM & MARY

CHARTERED 1693

## OFFICE OF UNIVERSITY ADVANCEMENT

### **Assistant Director, Reunion & Affinity Annual Giving**

#### **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 5% effort to support Foundation Services LLC, a subsidiary of WMF, with the responsibilities outlined below.

#### **Position Summary**

The Assistant Director of Reunion & Affinity Annual Giving is a key member of the Reunion & Affinity Giving team in the Office of University Advancement at William & Mary.

Working under general direction of and reporting to the Director of Reunion & Affinity Giving, the Assistant Director will develop and implement strategic plans to maximize dollars raised through, and participation in, William & Mary's reunions and affinity programs. The Assistant Director manages a portfolio of donors, solicits annual gifts, develops and manages reunion and annual giving portfolios with at least one alumni decade and one to three reunion class years.

Assistant Directors on the Reunion & Affinity Annual Giving team are charged with program modification for the class ambassador program, reunion & affinity giving programs, volunteer engagement and volunteer management. The position is responsible for class & affinity giving and alumni relations outreach to include but not limited to volunteer training and management, class and affinity giving and key college-wide alumni solicitation events, new initiatives, and unit support.

The Assistant Director of Reunion & Affinity Annual Giving is responsible for the management of 10-15 classes, including 1-3 reunion class years as assigned by the Director.

One of the university's core values is belonging, and the Assistant Director will help foster a community that embraces all people and perspectives. This position is based in Williamsburg and is expected to work in the office on campus, eligible to work remotely up to two days per week.

Read more details about our team here 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 or the equivalent combination of education, training and or experience.
- Experience managing and developing relationships with constituents, clients, customers, in a for-profit or nonprofit setting. 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 (typically 2-3 years).
- Experience working in a fast-paced office environment with an understanding of general office procedures, practices and prioritization of workflow, and managing priorities concurrently within strict deadlines, and a desire to collaborate across multiple teams (typically 2-3 years).
- Strong communication skills with proven ability to manage and train volunteers.
- Strong analytical, computational and quantitative skills, with the ability to extract and analyze data, produce reports in a variety of formats, with the demonstrated ability to resolve problems, respond to inquiries, obtain and disseminate information.
- Proficiency with a variety of software applications to include web-based applications and MS Office (with strong skills in Word and Excel), to include creating mail-merges and developing spreadsheets with formulas and data links.

## **Preferred Qualifications**

- Experience working with database applications and CRM systems (typically 3+ or more years).
- Strong fundraising skills with the demonstrated ability to identify, qualify and cultivate prospective donors or clients, and desire to reach aggressive goals.
- Demonstrated understanding of an environment of fundraising, volunteer engagement and its role in fundraising, donor relations, and higher education with respect to confidentiality of information that relates to the donor base.
- Demonstrated project management experience in a related field.

## **Conditions of Employment**

- This position is subject to additional hours beyond the typical workday/week, including evenings and weekends.
- Ability to travel as needed.

## **Position Duties**

Implement of Class, Reunion & Affinity Giving Programs, 40%

- Serve as a member of the Annual Giving team with a primary focus on class & affinity giving and reunion campaigns.
- Organize and coordinate fundraising efforts for designated classes and affinities by engaging and supporting the institutions leading volunteers and donors.
- In concert with the Director, and working in partnership with other University Advancement colleagues, develop strategic solicitation programs, participation and dollar goals for each class/affinity and class-based models for screening and rating alumni. Evaluate results of solicitation activities for each prospect over time and evaluate/re-evaluate potential for future solicitations.
- Provide volunteer management, including governance, volunteer identification, recruitment and retention, communications, stewardship, reunion development training including management of the assignment process and regular pro-active contact with volunteers about progress with their assignments.

- Provide ongoing, day-to-day tactical support for reunion gift/class & affinity giving chairs, including the production and management of prospect reports and other relevant information.
- Facilitate ongoing communication between volunteers involved in capital fundraising and development officers; coordinate volunteer involvement in cases for which staff have primary responsibility. Promote positive donor relations in person and via phone/mail/email/social/etc.
- Build active and effective relationships across the advancement community to assure cooperative and well-coordinated relationships, which help to advance the free and professional exchange of advancement information for the Class Ambassador, Reunion and Affinity Programs.
- Lead or collaborate on a variety of projects, such as alumni reunion programming, off-reunion year programming, fraternity & sorority challenge programming and communications centered on the impact and involvement of private gifts.
- Evaluate results of solicitation activities for each prospect over time and evaluate/re-evaluate potential for future solicitations.
- Provide ongoing, day-to-day tactical support for reunion gift/class giving & affinity chairs, including the production and management of prospect reports and other relevant information.
- Structure gift opportunities and collaborate with other fundraising colleagues, as needed, to maximize giving.
- Promote positive donor relations in person and via phone/mail/email/social/etc.
- Travel in tandem with development officers of the university as necessary.
- Analyze programs and make recommendations for program refinement.

#### Individual Portfolio Development & Management, 25%

- Develop, manage and continually evaluate a portfolio of donors and prospects capable of making lead annual and major gifts to William & Mary.
- Identify, cultivate, solicit, and steward prospects, focusing on pipeline development to meet and exceed increasingly aggressive annual fundraising goals.
- Execute appropriate communication/cultivation plan for each prospect.
- Prepare written proposals to solicit prospects for gifts in support of William & Mary.
- Virtually interact and travel in the continental United States to meet personally with current and potential donors to promote the priorities of William & Mary.

#### Engagement, Solicitation and Stewardship, 20%

- Set up reunion campaigns through the volunteer management tool and train alumni involved with current volunteer campaigns. Responsible for the reporting and metrics pertaining to assigned classes.
- Strategize with colleagues to recruit and develop a diverse, strong and motivated base of volunteers. Work closely with class leaders to ensure diverse volunteer development and reunion progression.
- Determine ways to streamline class volunteer interaction and communication between staff across University Advancement and volunteers.
- Enhance non-reunion year communication presence through volunteer engagement, identification, support, training and solicitation.
- Devise an overall strategy for solicitation and stewardship of donors and volunteers; arrange thank-a-thon events in conjunction with donor relations staff.
- Work directly with the Annual Giving Direct Marketing team on the production of all solicitation- based and stewardship- based marketing and communication materials.
- Establish measurable outcomes for participation, solicitation, diverse pipeline growth, new attendees, degree of impact surrounding attendance on giving and other variables surrounding events.

#### Administrative & Other Functions, 10%

- Oversee and strategize benchmarking, budgeting and measurements and reporting with the Director, Reunion & Affinity Annual Giving.
- Analyze programs and make recommendations for program refinement, including developing a diverse pipeline of donors.
- Nominate and promote alumni for awards and recognition.
- Attend University Advancement, various reunion, board, and other William & Mary meetings. Determine ways to increase awareness of activities and profile within the office.
- Participate as volunteer in University Advancement events. Attend professional development trainings.
- Assist other departmental areas and other related duties as assigned.

William & Mary Foundation, 5%

- Negotiate, finalize, accept, document, and execute gift agreements to the WMF.
- Record and store gift agreements to the WMF.
- As appropriate, manage and invest gifts to the WMF.
- Document, administer and steward gifts to the WMF.

**Equal Opportunity Statement**

William & Mary values diversity and invites applications from underrepresented groups who will enrich the research, teaching and service missions of the university. The university is an Equal Opportunity/Affirmative Action employer and encourages applications from women, minorities, protected veterans, and individuals with disabilities.

### **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>.