



WILLIAM & MARY

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

Senior Gift and Records Processing Specialist

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 was created for the purpose of advancing and furthering the aims and purposes of the university of William & Mary (the “University” or “William & Mary”) by the development and application of financial and other resources to the progress of the University and is organized and operated exclusively for charitable, scientific, and educational purposes, within the meaning of section 501©(3) of the Internal Revenue Code, including receiving, managing, investing, and administering private gifts and property and making expenditures to or for the benefit of the University.

Consistent with the university’s shared services agreement with the William & Mary Foundation (WMF), this position is assigned 25% effort to support Foundation Services, LLC, a subsidiary of the WMF, with the responsibilities outlined below.

Position Summary

The Senior Gift and Records Processing Specialist is an integral member of the Office of Gift & Records Administration in the Office of University Advancement at William & Mary.

Reporting to the Associate Director of Gift Processing and Data Integrity, the Senior Gift and Records Processing Specialist is responsible for processing and maintaining accurate records of philanthropic contributions, donor information, and alumni data in support of the institution’s fundraising and engagement efforts. This is a leadership role within the gift processing team and is responsible for distributing work to and reviewing the work of the Gift Processing and Records Specialists. The Senior Gift and Records Processing Specialist also collaborates with various units in the Office of University Advancement on solicitations and gifts and pledges requiring special attention.

The Senior Gift and Records Processing specialist is responsible for processing complex gifts that require significant attention to detail and a high level of customer service as well as data entry and data validation. The Senior Gift and Records Processing Specialist follows appropriate standards and policies and works with speed and a high degree of accuracy to fulfill the team’s goal to ensure that all gifts, pledges and pledge payments are processed accurately and efficiently, and the accuracy and integrity of constituent records are maintained as mandated by professional and legal requirements.

The Senior Gift and Records Processing Specialist 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

- High school diploma or equivalent.
- Familiarity with and understanding of the purpose of fundraising in higher education or a nonprofit setting.
- Bookkeeping experience, using automated bookkeeping software and/or system (typically 1-2 years).
- Demonstrated ability and desire to learn, retain and apply complex, detailed processes and procedures.
- Proficiency working with a variety of software applications (MS Office).
- Strong mathematical and computational skills and the ability to audit or proof one’s own work to ensure accurate calculations.
- Strong analytical and problem-solving skills with the ability to analyze large sets of data, and reports.
- Ability to work independently, exercise discretion, diplomacy and use good judgment in performing all responsibilities.
- Commitment to meet expectations of efficiencies, timeliness and accuracy.
- Strong oral and written communication skills with a strong customer service orientation, the ability to articulately respond to donor calls and inquiries, ability to provide effective feedback on colleagues’ work within the department, and ability to provide instruction and training to junior team members.
- Strong organizational skills with the ability to thrive in a fast-paced, cyclical environment while managing multiple priorities within strict deadlines.

Preferred Qualifications

- Bachelor’s degree in business, accounting, finance or related field.
- Demonstrated experience working in a bookkeeping or data entry function in a fast-paced and busy office (typically 2-4 years).
- Experience with a relational database (typically 3-5 years).
- Experience with Gift Processing, Database Management, and/or Donor Services activities of a Non-Profit Organization, especially higher education.

Conditions of Employment

- This is a non-exempt position, eligible to receive overtime in accordance with the Fair Labor Standards Act.
- This position is subject to overtime during high peak times (e.g., during the end of the calendar and end of the fiscal year).

- This position may also be required to work beyond the typical workday/week and work during holiday break in order to meet the needs of the business.

Position Duties

Gift Processing, 50%

- Manages the intake of gifts into the department's project management workflow, ensuring all gifts are distributed for processing into the CRM.
- Reviews the work of the Gift Processing Specialists, ensuring accuracy and timeliness.
- Provides guidance and training for Gift Processing Specialists and serves as a resource for gift and data integrity inquiries.
- Processes complex gifts that require high attention to detail.
- Completes all the necessary steps with speed and a high degree of accuracy to ensure all gifts, pledges, pledge payments made by a variety of mechanisms (including, but not limited to check, credit cards, securities, payroll deduction, grants, donor advised funds, IRA distributions and gifts in kind) are processed following financial standards, University policies, and IRS regulations to the William & Mary Foundation or other University foundations.
- Accurately determines the appropriate donor intent based on documentation provided.
- Researches incomplete information from a variety of sources to avoid entering gifts into a temporary holding account.
- Maintains documentation for all posted transactions in accordance with document retention policies and procedures.
- Prepares matching gift forms to be sent to matching companies and confirms matching gift transactions sent by matching gift company sites.
- Assists with producing gift receipts and acknowledgements, donor tax letters and other gift-related correspondence including acquiring proper signatures, preparing envelopes, and mailing.
- Follows policies and guidelines for data entry of confidential, sensitive, and protected information as set forth by the William & Mary Foundation or other University foundations.

Financial Controls, 25%

- Receives and handles multiple forms of donations, including cash, checks, and credit card information as well as payroll deduction information, securities, and gifts in kind for the William & Mary Foundation or other University foundations.
- Maintains control log and documentation related to William & Mary's third-party lockbox provider.
- Validates information in multiple systems for accuracy and identifies errors and discrepancies.
- Produces and prepares transmittals for daily deposit either through remote deposit capture technology, or direct transfer to the appropriate related foundation.
- Enforces and monitors business process controls designed to safeguard the integrity of finance-related data, and protects assets, in cooperation with our finance function.
- Prepares for and responds to audit requests.

Records Processing / Data Integrity, 15%

- Protects and enforces the privacy and confidentiality of donor records, including the management, organization, and security of donor files.
- Conducts data entry, updates and verification processes to enhance database quality.
- Adds new or updates biographical information for donor records manually or using import tools.
- Identifies potential and existing data integrity concerns utilizing audit tools including queries.

Customer Service & Office Administration, 10%

- Responds to donors' concerns or questions received by phone or email.
- Conducts related research of giving history, documentation, and current statements and relays accurate information to donors.
- Serves as a liaison to University departments.
- Strategizes in unit meetings regarding special projects and events impacting contributions as needed.
- Collaborates with various units in Advancement on solicitations and items requiring special attention or exceptions to current practices.
- Participates in cross training with other team members and other teams. Acts as backup for team members when necessary.
- Helps create and maintain procedure documents.
- Contributes to the team functioning as a consistent, knowledgeable and reliable resource for our staff and constituents.
- 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.



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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 **Senior Gift Processing Specialist** with the top salary of **\$64,000, 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 attend 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 between 12 and 27 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

The [Educational Assistance Policy](#), permits eligible faculty and staff who participate in the VRS or ORP retirement program to take advantage of educational opportunities. Participation in the program is by approval only. An eligible employee may be approved to enroll in an academic credit course of instruction at William & Mary and have the current tuition paid for or waived within the terms of the policy. An eligible employee may also be approved to enroll in an academic credit course of instruction at an institution other than William & Mary and have the current tuition reimbursed under the terms of the policy, provided the courses are not offered at William & Mary and are directly related to the employee's job.

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.