



United Way of North
Central New Mexico

United Way of North Central New Mexico (UWNCNM) Tocqueville Donor Relations Specialist Job Description

Revised: January 2024

Job Title: Tocqueville Donor Relations Specialist	Department: Finance
Reports to: Pledge Processing Team Lead	Status: Hourly, Non-exempt, Full-time
Salary Classification: Level II	Location: Albuquerque

ORGANIZATION:

Headquartered in Albuquerque, United Way of North Central New Mexico (UWNCNM) serves the people of five counties: Bernalillo, Sandoval, Santa Fe, Tarrant, and Valencia. Our mission is connecting people to opportunities and services to equitably improve lives and strengthen communities.

UWNCNM brings together donors, businesses, nonprofits, government, and others to create better solutions to our community's challenges. Our programs and donor dollars ensure that individuals and families in central New Mexico have the opportunity to achieve potential through education, that they are healthy and safe, are financially stable and live life with dignity.

In addition, UWNCNM has a strong commitment to Diversity, Equity and Inclusion and upholds the following values:

- We value the visible and invisible qualities that make you who you are.
- We welcome that every person brings a unique perspective and experience to advance our mission and progress our fight for the health, education, and financial stability of every person in every community.
- We believe that each United Way community member, donor, volunteer, advocate, and employee must have equal access to solving community problems.
- We strive to include diversity, equity, and inclusion practices at the center of our daily work.

We commit to using these practices for our business and our communities.

PURPOSE:

Ensure a high level of personalized customer service to Tocqueville Society donors with consistency and dependability and steward Tocqueville Society donor relationships and gifts. Provide turn-key service to all Tocqueville Society members, supporting their payment and designation choices, acknowledgement of their gifts, recognition, and special events.

ESSENTIAL FUNCTIONS:

Administrative (80%)

- Manages all Tocqueville Society members' accounts with accurate data entry and record keeping.
- Management of accurate records of Tocqueville Society members' contact information, personal data and pledge/payment data in donor database.
- Manages all Tocqueville Society members' designation requests, payments, payment preferences and pledges.
- Tracks and manages data through Prospect Management tool in donor database.

- Tracks, manages and makes financial adjusts to Tocqueville donors' Personal Philanthropy Accounts working with the donors to accurately distribute their funds.
- In working closely with the Major Gifts Tocqueville Officer, tracks and manages member recommitments and recruitment of new members through Prospect Management tool in donor database.
- Collaborates with Investor Relations and IT teams in establishing, editing and following donor database and finance procedures and development of new procedures and processes for Tocqueville Society.
- Manages the acknowledgements of all Tocqueville Society pledges and payments through personal letters and statements.
- Manages monthly, quarterly and annual Tocqueville donors pledge billing/reminders.
- Manages Tocqueville donors' quarterly giving statements and annual tax letters/statements.
- Manages and executes Tocqueville bi-monthly financial payouts including two via ACH and two via check.
- Tracks and manages pending payments and letters to agencies with each payout ensuring proper recognition of all gifts.
- Provides customer service and communications for DonorLink.
- Regularly review processes and procedures to ensure they are current and complete.
- Look for efficiencies in processes and procedures and revise with management approval.

Outreach, Internal and External Communication (20%)

- Builds relationships with Tocqueville Society members for UWNCNM through personal interaction.
- Provides top notch customer service to all donors and volunteers.
- Corresponds with the Tocqueville Society members through clear, concise written and verbal communication.
- Attends Tocqueville Society events.
- Collaborates with and provides input and support to the Finance Team.
- Adds creative ideas through written and verbal communications, events and projects.

OTHER:

- Performs other duties and special projects, as assigned.
- Attends meetings and training monthly and as required.

CORE COMPETENCIES:

- Provide the highest level of customer service to volunteers, donors and staff.
- Strong written and oral communication skills, including concise, professional writing.
- Requires high level of organizational and interpersonal skills.
- Must be able to work both independently and within a team.
- Must be highly organized to meet deadlines and track multiple simultaneous projects, yet flexible to meet changing needs and unexpected requests.
- Knowledge of basic bookkeeping or accounting.
- Must be able to meet deadlines and be flexible.
- Ability to use computers to manage data and compose reports; ability to interpret computer-generated reports and analyze data.

- General attributes should include ability to manage several projects/tasks simultaneously, track the results of projects, and work effectively with people from different backgrounds, offer strong self-motivation, positive attitude and willingness to commit to the values of the organization, participate effectively on teams, and offer ideas to enhance the organization.
- Must conduct self in a professional manner.

MINIMUM REQUIREMENTS:

- Bachelor's degree preferred or 5 years' experience in a financial/accounting role or administration.
- Proficiency in all Microsoft Office products and attention to detail are critical in this position.
- Flexibility, independence, critical thinking and decision-making skills are required to succeed in this position.
- The position requires a commitment to working in team settings, an understanding of internal and external customers, including staff and volunteer management.
- Excellent spelling and grammar, ability to exercise tact and good judgment.
- Ability to compile information, prepare reports and light bookkeeping.
- Effective time management and ability to manage responsibilities independently and exercise initiative.

EQUIPMENT USED:

- PC and standard office equipment
- Telephone, computer, copy machine, printer, scanner, fax machine and related equipment
- Microsoft Office, Internet Explorer, Outlook

PHYSICAL REQUIREMENTS/WORKING CONDITIONS/DEXTERITY:

UWNCNM is a hybrid workplace, with a schedule combining work-from-home on Mondays, Wednesdays and Fridays, and in-person office attendance within UWNCNM's office building required on Tuesdays and Thursdays. The hybrid work schedule is subject to change to 100% in office work at any time. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Position is primarily in a standard office environment.
- Position requires long periods of sitting at a desk and computer to accomplish duties and to stand for limited periods of time.
- Regular attendance is required in this position.
- Must have access to reliable internet when working from home.
- Must be able to operate a computer at an acceptable rate of speed.
- Must be able to view computer monitors.
- May be required to lift and/or move up to 20 pounds unassisted and occasionally lift and/or move up to 40 pounds with assistance.
- Must be able to work occasional early mornings, evenings and weekends to attend a variety of events.
- Must possess a valid New Mexico driver's license and have daily access to a dependable motor vehicle with insurance.
- Must be able to perform the essential functions of the job with reasonable accommodation.

STARTING SALARY: \$22.50-\$24.00 per hour depending on experience, non-exempt, 35 hours per week FTE (Full Time Employee)

BENEFITS: Full-time employees (FTE) are eligible for health, dental, life and long-term disability insurance, a retirement plan, flexible spending account and voluntary insurance programs. We offer a tuition reimbursement plan, volunteer time off, and generous leave time. Part-time employees (PTE) may be eligible for some of these benefits.

UWNCNM supports the Americans with Disabilities Act (ADA). Please tell us if you need accommodation to perform the job's essential functions. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

United Way of North Central New Mexico is committed to creating a diverse environment and is proud to be an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or veteran status. We welcome applicants with disabilities and applicants from underrepresented racial and ethnic groups.

NOTICE: This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position.

This job description is meant only to be a guideline and may be modified at any time. UWNCNM is an At-will Employer. This document does not create an employment contract, implied or otherwise, other than an "at will" employment relationship.

Interested applicants must submit a resume and cover letter to applicant@UWNCNM.org by January 28, 2024.