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<b>Job Title:</b> Investor Relations Administrative Assistant	<b>Department:</b> Investor Relations
<b>Reports to:</b> Campaign Director	<b>Classification:</b> Level II
<b>Location:</b> Albuquerque	<b>Exempt:</b> Hourly, Non-exempt

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**ORGANIZATION:**

Headquartered in Albuquerque, United Way of North Central New Mexico (UWNCNM) serves the people of five counties: Bernalillo, Sandoval, Santa Fe, Torrance 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 north 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 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:**

The Investor Relations Administrative Assistant plays a crucial role in ensuring the Investor Relations department runs smoothly and efficiently. This position provides comprehensive administrative and scheduling support for the Campaign Director. The IRAA provides a wide range of administrative support to the entire Investor Relations team including coordinating and assisting with each IR team member's work, providing logistical support for meetings and events, and managing and documenting the administrative functions of the Investor Relations Team (Fundraising department). Additionally, the role involves managing projects such as direct mail and acknowledgment letters with the support and guidance of the Campaign Director. The Investor Relations Administrative Assistant significantly contributes to the department's success and overall efficiency.

## **ESSENTIAL FUNCTIONS:**

### **Project Management:**

- Lead and assist in project management for Corporate Relations, Major Gifts, and Donor Groups, tracking donor commitments, coordinating meetings, and ensuring timely follow-ups.
- Manage multiple projects and deadlines, keeping corporate campaigns, major gifts initiatives, and donor group activities on track.
- Oversee donor acknowledgment processes, ensuring timely and accurate letters for Corporate Partners, Major Gifts donors, and Donor Groups members while maintaining updated process documentation.
- Coordinate and manage direct mail campaigns, supporting donor outreach and stewardship efforts across all investor relations programs.
- Support Corporate Relations Officers, Major Gifts Officers, and Donor Groups Managers by tracking sponsorships, coordinating donor touchpoints, and aligning engagement strategies with campaign goals.
- Organize key campaign meetings, prepare agendas, tracking discussion points, and ensure action items are completed.
- Assist in donor engagement strategies, managing sponsorship tracking, donor data, and appreciation initiatives.

## **Investor Relations Administrative Functions**

### **Meeting & Event Coordination:**

- Schedule, send invitations, track RSVPs, and arrange logistics for Campaign Cabinet, Major Gifts donor events, Donor Groups meetings (Tocqueville Society, Women United, Hispano Philanthropic Society, Young Leaders Society and Retire United), and Corporate Relations engagements.
- Record and distribute meeting minutes, ensuring follow-ups on action items.
- Provide logistical support for team meetings, donor events, planning retreats, and large-scale gatherings, including venue setup, catering, materials, registration, and travel arrangements for Investor Relations team members.

### **Donor & Data Management**

- Maintain accurate donor records in Enterprise CRM, supporting Corporate Relations Officers, Major Gifts, and Donor Groups teams with roster management, coding, and donor stewardship.
- Track and process donor acknowledgments, pledge letters, and tax receipts for workplace campaigns, Corporate Partners, Major Gifts donors, and Donor Groups members.
- Oversee donation tracking, including workplace giving, sponsorships, in-kind gifts, raffles, and special campaigns.

### **Campaign & Fundraising Support**

- Assist in hiring, onboarding, and training seasonal Campaign Coordinators to align with donor engagement efforts.
- Support account management, campaign communications, and donor engagement strategies by ensuring accurate data entry and reporting.
- Provide up-to-date campaign status reports and track campaign progress.

### **Administrative & Operational Support**

- Provide day-to-day administrative support, including scheduling, correspondence, and document management.
- Manage office and event supplies, electronic filing systems, and general inventory.
- Work with IT and Management to ensure efficient account distribution and database management.
- Act as a liaison with Marketing to track campaign collateral and ensure program updates are reflected in materials and digital platforms.
- Maintain and update the Investor Relations Team Processes & Procedures Manual to improve efficiency.
- Attend staff meetings, trainings, and other meetings and trainings as required or assigned.
- Participate actively in fundraising initiatives by coordinating donor and stakeholder communications, supporting event planning, contributing to UWNCNM's shared goal of engaging all staff as fundraisers to support our mission and initiatives.
- Provide phone coverage for front desk as assigned.
  
- Provide administrative support to the President & CEO in the absence of the Executive Assistant.
- Complete other duties and special projects as assigned.

### **Minimum Requirements - Skills, Abilities, Knowledge, Education and Experience:**

#### **Education & Experience**

- Associate's degree in business, nonprofit management, communications, or related field.
- Minimum 2 years of experience in administrative support, project management, donor relations, fundraising, or event coordination, preferably in a nonprofit or fundraising environment.
- Experience working with corporate partnerships, major gifts, donor groups, and workplace giving campaigns is preferred.

#### **Skills & Abilities**

- **Project Management:** Ability to track multiple campaigns, donor engagements, and meeting logistics while ensuring deadlines are met.
- **Event Coordination:** Experience scheduling, planning, and supporting meetings, donor events, and fundraising initiatives, including managing invitations, RSVPs, catering, and travel arrangements.
- **Data & Donor Management:** Proficiency in maintaining accurate donor records, pledge acknowledgments, tax receipts, and campaign reports within a CRM system.
- **Administrative Excellence:** Strong organization, scheduling, and document management skills, including Microsoft Office Suite (Word, Excel, Outlook, PowerPoint).
- **Communication & Collaboration:** Exceptional verbal and written communication skills with the ability to draft donor correspondence, meeting minutes, and reports while coordinating across Corporate Relations, Major Gifts, and Donor Groups teams.
- **Marketing & Technology:** Ability to work with marketing teams to align campaign collateral and ensure program updates are accurately reflected across materials and digital platforms.
- **Initiative & Problem-Solving:** Ability to work independently, anticipate needs, and adapt to shifting priorities in a fast-paced, deadline-driven environment.
- **Attention to Detail:** Strong analytical skills with the ability to track donor interactions, campaign progress, and event logistics with accuracy.

#### **Work Style & Core Competencies**

- The ability to manage multiple priorities simultaneously while maintaining strong attention to detail.
- Strong team player, able to collaborate across Investor Relations, Marketing, and IT teams.
- Commitment to confidentiality, donor stewardship, and professionalism when engaging with corporate partners and high-level donors.
- Passion for United Way's mission and an understanding of nonprofit fundraising, donor engagement, and philanthropy.

#### **EQUIPMENT USED:**

- PC and standard office equipment (telephone, computer, copy machine, printer, scanner, fax machine).
- Microsoft Office Suite, Outlook, Videoconferencing platforms (Zoom, Microsoft Teams, etc.), Internet and web browsers for research and information gathering

#### **PHYSICAL REQUIREMENTS/WORKING CONDITIONS/DEXTERITY:**

United Way of North Central New Mexico is a hybrid workplace. For this position, the schedule combines work from home on Mondays and Fridays with in-person office attendance within UWNCNM's office building required on Tuesdays, Wednesdays and Thursdays. Due to business needs, you may occasionally be required to work in-office on days other than specified. Additionally, 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 and 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 be able to type 55 wpm
- Must be able to operate a personal computer at an acceptable rate of speed.
- Must be able to view computer monitors.
- Must have access to reliable internet when working from home.
- Must be able to work occasional early mornings, evenings and weekends including but not limited to attending a variety of meetings and events at UWNCNM and in the community.
- Must have the flexibility to adapt schedule to meet evolving business needs as necessary.
- Must possess a valid New Mexico driver's license and have daily access to a dependable enclosed motor vehicle, with current insurance coverage in your own name or named on the policy, to use to be physically present for in-office workdays and to attend offsite events, meetings, and other work activities.
- 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 perform the essential functions of the job with reasonable accommodation.

**LOCATION:** Must be a New Mexico resident and able to commute to the UWNCNM office building in Albuquerque, NM on designated in-office workdays to attend a variety of meetings and events at UWNCNM and in the community.

**RANGE:**

\$24.75 to \$26.00 per hour, hourly, non-exempt, 32 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 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,



**United Way of North Central New Mexico (UWNCNM)  
Investor Relations Administrative Assistant Job Description**

Revised: March 2025

sexual orientation, national origin, genetics, disability, age, or veteran status. We welcome applicants with disabilities and applicants from underrepresented racial and ethnic groups.

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.

**HOW TO APPLY:**

Interested applicants, or if you have additional questions, must supply a resume **and** cover letter to [applicant@UWNCNM.org](mailto:applicant@UWNCNM.org) by March 30, 2025. Reference in the subject line: Application for Investor Relations Administrative Assistant.