
Job Title: Donor Relations Specialist**Department:** Finance**Reports to:** Senior Pledge Processor & 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 UWNCNM's donors and agency partners, with a strong emphasis on providing consistent, dependable stewardship of 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.

- Ensures 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.
- Manages and reconcile adjustments to non-Tocqueville donor pledges and payments.
- Tracks, manages and makes financial adjustments 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.
- Distributes Tocqueville donors' quarterly giving statements and annual tax letters/statements.
- Completes the 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, updates and communications for DonorLink and AgencyLink.
- Research returned agency checks and dissolved agencies.
- Oversees Designation Management, Payout Module, and AgencyLink database.
- Regularly review processes and procedures to ensure they are current and complete.
- Look for efficiencies in processes and procedures and revise with management approval.
- Contributes to the organizational shared goal of raising funds to support the mission and initiatives.

Outreach, Internal and External Communication (20%)

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

General:

- Participates actively in fundraising initiatives by coordinating donor and stakeholder communications, handling tasks such as fundraising pledge and payment processing, contributing to UWNCNM's shared goal of engaging all staff as fundraisers to support our mission and initiatives.
- Attend all staff meetings and trainings, and attend other meetings and trainings as required or assigned.
- Performs other duties and special projects, as assigned.

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.
- Proficient in internet navigation and online research using modern web browsers to gather, verify, and utilize information effectively for job-related tasks
- Demonstrate a comprehensive understanding and practical experience with AI, including data analysis, AI driven decision making, and the application of AI tools to enhance operational efficiency and innovation.
- Professionalism: Demonstrates professionalism in conduct and communication with colleagues and clients, and ability to represent Finance and Human Resources in a highly professional manner with a diverse group of individuals, both internally and externally.

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:

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

PHYSICAL REQUIREMENTS/WORKING CONDITIONS/DEXTERITY:

UWNCNM is a hybrid workplace. This position is scheduled to work 8 hours a day, 4 days a week Tuesday through Friday. The schedule combines work-from-home on Wednesdays and Fridays, with mandatory in-person office attendance within UWNCNM's office building required on Tuesdays and Thursdays. Due to business needs, you may occasionally be required to attend in-office days other than Tuesdays and Thursdays. The hybrid work schedule is subject to change, and you may be required to work 100% in-office 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 operate a personal computer at an acceptable rate of speed and to view computer monitors.
- On designated in-office days, the employee must be able to perform duties within a cubicle setting, maintaining focus and productivity in an environment with varying levels of ambient noise, including conversations and other typical office sounds.
- 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.
- 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 motor vehicle with insurance to commute to work on designated in-office days, and to use to attend offsite events, meetings, and other work activities, including those specific to the job.
- Must be able to lift and/or move up to 20 pounds unassisted and occasionally lift and/or move up to 40 pounds with assistance.



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

Revised: November 2025

- Must be able to perform the essential functions of the job with reasonable accommodation.

SALARY RANGE: \$27.00 to \$30.50 per hour, 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 (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.

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 by **November 30, 2025**. Reference in the subject line: Application for **Donor Relations Specialist**.