

Job Title: Finance & 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:

The Finance & Donor Relations Specialist ensures a high level of personalized customer service to UWNCNM's donors and agency partners, with a strong emphasis on accurate financial stewardship, donor account management, and efficient processing of donor gifts and designations. This includes providing consistent, dependable stewardship of Tocqueville Society donor relationships and gifts, ensuring that these valued contributors receive attentive support and reliable management of their philanthropic commitments. The role further supports donor engagement, financial reporting, and compliance, contributing to the organization's fundraising and mission-driven goals.

ESSENTIAL FUNCTIONS:

Administration (70%)

- Manages all donor and Tocqueville Society members' accounts, including accurate data entry, record keeping, and reconciliation of pledges, payments, and financial adjustments.
- Tracks, completes and manages donor and Tocqueville Society members' financial transactions including:
 - Processing designation requests, payments, payment preferences, and pledges in the donor database and other databases, and utilizes the Prospect Management tool.
 - Making financial adjustments to Tocqueville donors' Personal Philanthropy Accounts working with the donors to accurately distribute their funds.
 - Managing monthly, quarterly and annual pledge billing and reminders for Tocqueville and other donors.
 - Coordinating bi-monthly financial payouts for Tocqueville donors (Two via ACH and two via check).
 - Preparing pending payments and letters to agencies with each payout ensuring proper recognition of all gifts.
 - Reconciles adjustments to donor pledges and payments.
- Ensures accurate records of donors and Tocqueville Society members' contact information, personal data and pledge/payment data in donor database.
- In working closely with the Major Gifts Tocqueville Officer, tracks and manages member commitments and recruitment of new members through Prospect Management tool in donor database.
- Collaborates with Investor Relations, Finance and IT teams to establish, edit and follow donor database and finance procedures including but not limited to input, support, 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.
- Distributes Tocqueville donors' quarterly giving statements and annual tax letters/statements.
- 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 and update donor management processes and procedures to ensure accuracy and completeness, proactively identifying efficiencies and implementing improvements with management approval.
- Ensure compliance with internal controls, audit requirements, and financial reporting standards.
- Prepare and distribute financial reports, donor statements, and documentation for audits and reviews.
- Contributes to the organizational shared goal of raising funds to support the mission and initiatives.

Donor Engagement and Customer Relationship Management (Internal and External) (30%)

- Builds relationships with donors and Tocqueville Society members through personal interaction stewardship, and timely communication, including providing turn-key service to all Tocqueville Society members by supporting their payment and designation choices, acknowledging their gifts, facilitating recognition, and supporting Investor Relations with Tocqueville special events.
- Provides top-tier customer service to all donors, volunteers and agency partners.
- Respond to all donor concerns appropriately and in a positive manner.
- Drafts and sends personalized acknowledgments, thank-you letters, and reports.
- Attends donor and Tocqueville Society events and supports donor recognition activities.
- Responds to donor inquiries regarding financial transactions, account status, and giving options

General & Team Support:

- Participates actively in fundraising initiatives and cross-functional projects by coordinating donor and stakeholder communications, handling tasks such as fundraising pledge and payment processing, to support our organizational goals, mission and initiatives.
- Attend all staff meetings and trainings, and events as required or assigned.
- Performs other duties and special projects as assigned.

CORE COMPETENCIES:

- Deliver the highest level of customer service to volunteers, donors and staff.
- Demonstrate strong financial acumen, attention to detail, and knowledge of basic bookkeeping or accounting, ensuring accuracy in donor account management and financial stewardship.
- Exhibit excellent written and oral communication skills, including clear, concise, and professional correspondence and interactions with donors, volunteers, and colleagues.
- Contribute creative ideas and solutions through effective communication, events, and projects.
- Maintain a high level of organizational and interpersonal skills, managing multiple projects and deadlines while remaining flexible to changing needs.
- Work independently and collaboratively, showing initiative, self-motivation, a positive attitude, adaptability, and a commitment to team success.
- Proficiently use Microsoft Office Suite, donor management software, and online research tools to manage and analyze data, compose and prepare reports, and support decision-making.
- Demonstrate practical experience with AI and data analysis tools to enhance operational efficiency and innovation, inform strategic decisions, and drive continuous improvement.

- Proficient in internet navigation and online research using modern web browsers to gather, verify, and utilize information effectively for job-related tasks.
- Foster a welcoming and respectful workplace culture by working effectively with people from diverse backgrounds, actively committing to organizational values, and participating in team efforts to improve processes and outcomes.

MINIMUM REQUIREMENTS:

- Bachelor's degree or 2 years' experience in a financial/accounting role or administration.
- Experience in nonprofit donor stewardship, financial reporting, or accounting.
- Proficiency in all Microsoft Office products.
- Flexibility, independence, critical thinking and decision-making skills.
- 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, and good judgment.
- Ability to compile information, prepare reports and light bookkeeping.
- Effective time management, 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.



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Revised: December 2025

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

SALARY RANGE: \$27.00 to \$31.00 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 (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:



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Interested applicants, or if you have additional questions, must supply a resume and cover letter to applicant@uwncnm.org by **January 25, 2026**. Reference in the subject line: Application for **Finance & Donor Relations Specialist**.