

**UNITED WAY OF CENTRAL NEW MEXICO**  
***JOB DESCRIPTION***

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Job Title: **Tocqueville Society Donor Relations Specialist**

Department: **Donor Relations, Development Team**

Exempt: **No**

Reports to: **Director of Donor Relations**

Salary Classification: **Level II**

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**ORGANIZATION:**

Headquartered in Albuquerque, United Way of Central New Mexico (UWCNM) serves the people of four counties: Bernalillo, Sandoval, Torrance, and Valencia. Its mission is to bring people and resources together to measurably improve lives and strengthen our communities.

UWCNM 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.

UWCNM has a strong commitment to Diversity, Equity and Inclusion and is seeking a Tocqueville Society Donor Relations Specialist who will contribute to this cross-functional organizational initiative and uphold 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**

- 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.
- Manages all Tocqueville Society members' accounts with accurate data entry and record keeping.

- 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.
- Tracks and manages member recommitments and recruitment of new members through Prospect Management tool in donor database.
- Collaborates with Finance and IT staff 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.
- Provides customer service and communications for DonorLink.

### **Outreach, Internal and External Communication**

- Builds relationships with Tocqueville Society members for UWCNM through personal interaction.
- Provides top notch customer service to all donors and volunteers.
- As a member of the Development Team, supports and assists with the recommitment of Tocqueville Society members and recruitment of new members.
- Provides support to the Tocqueville Society Committee volunteers.
- Corresponds with the Tocqueville Society members through clear, concise written and verbal communication.
- Attends Tocqueville Society and appropriate workplace campaign meetings and events.
- Collaborates on the annual publication of the Year in Review book, including administering the Tocqueville Society section.
- Collaborates with and provides input and support to the Development Team.
- Adds creative ideas through written and verbal communications, events and projects.
- 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.
- 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 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 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.

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.

**SALARY RANGE:**

Hourly Rate of \$22 - \$23.50, dependent upon experience (based on a 35 hour work week).

UWCNM pays 50% of employee health and dental premiums for the first two years of employment and 100% after, matches 403(b) contributions up to 3% and has a generous vacation and sick leave policy.

**EQUIPMENT USED:**

Standard PC based office equipment.

**PHYSICAL REQUIREMENTS:**

Standard office environment. Position is primarily an office setting, requiring long periods of sitting at a desk and computer. The position requires the ability to lift 20 pounds unassisted, 40 pounds with assistance.

Interested applicants should forward a cover letter and resume to [applicant@uwcnm.org](mailto:applicant@uwcnm.org) by Friday, July 30.

*United Way of 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.*