

# UNITED WAY OF CENTRAL NEW MEXICO

## *Major Gifts and Planned Giving Director*

### JOB DESCRIPTION

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**Job Title:** Major Gifts and Planned Giving Director      **Department:** Development  
**Exempt:** Yes      **Reports to:** Chief Corporate  
**Salary Classification:** Level IV      **Relations Officer**

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#### **ORGANIZATION:**

Headquartered in Albuquerque, United Way of Central New Mexico (UWCNM) serves the people of five counties: Bernalillo, Sandoval, Santa Fe, 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 Major Gifts and Planned Giving Director 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:**

To increase resources to support UWCNM's purpose, vision, mission, and initiatives through Principal Gifts (\$25,000 and more) and Legacy Gift commitments.

## **ESSENTIAL FUNCTIONS:**

### **Job Responsibilities:**

- Identify and cultivate prospects and solicit gifts:
  - For immediate and multi-year support
  - Build long-term assets, including endowment
  - Legacy (Planned) gifts
- Build and manage relationships:
  - For UWCNM staff and volunteers with investors and prospective investors
  - Support colleagues in their relationships with identified prospects
  - Develop and manage cultivation and solicitation strategies for priority prospects
- Identify prospects
  - From donors lists and other UW relationships
  - From research – prospects without relationships with UW
  - Prioritize prospects to maintain a continuous list for active cultivation
- Steward all Principal and Legacy gift commitments
- Manage volunteers in fundraising and supporting services to investors
- Record and track multi-year and Legacy gift commitments
- Interact with UWCNM staff regarding DDI activity
  - With Development staff as a vital resource for identifying opportunities and moving prospects toward large gifts
  - With Development Team relative to perspective and skills to ask for larger investments, including Legacy Gifts
  - With Community Impact, Finance, and Communications Teams in consideration, development, and marketing of investment opportunities
- Participate in Community Impact Committee activity as liaison relative to Principal & Legacy gifts
- Participate in activities of Finance Committee, and its Investment Sub-Committee relative to Legacy assets and endowment
- Manage volunteer Gift Acceptance Committee to apply policies and make recommendations to Finance Committee regarding gifts other than cash and securities
- Coordinate with CEO to maintain high level of involvement of board of directors in Principal and Legacy gift activities
- Evaluate various gift opportunities and giving vehicles relative to suitability for prospective investors
- Maintain a community presence via organizations and events
- Maintain policies and procedures for Legacy Giving
- Maintain documentation re Principal Gifts and Legacy Giving records
- Other duties as assigned

## **Core Competencies:**

### **Builds Relationships**

Initiates, builds and continuously strengthens relationships with investors and prospects.

### **Achieves Results**

Takes initiative, maintains a persistently focused effort, remains goal and results oriented, and continues to improve.

### **Communicates Effectively**

Communicates through listening and in an open, candid and consistent manner; delivers information effectively in a variety of settings including one-on-one, team settings, and diverse group presentations or meetings. Delivers information effectively in a variety of formats including letters, memos, analytical reports, and presentations.

### **Influence Management**

Able to make a persuasive argument to influence an audience; develops and uses subtle strategies to influence others; works to make others feel ownership in one's own solutions; identifies key decision-makers on issues of concern; develops and effectively uses networks, inside and outside of UWCNM.

## **MINIMUM REQUIREMENTS [EDUCATION]:**

Education: Bachelor's Degree

## **MINIMUM REQUIREMENTS [EXPERIENCE]:**

Skills:

- Technical and analytical skills
- Strong communication skills
- Sales skills

Experience:

- 3 years' experience with solicitation and maintenance of planned gifts
- Experience as a development professional soliciting major gifts
- Experience working with and supporting volunteers

## **SALARY RANGE:**

Annual salary of \$80,000 - \$90,000, dependent upon experience.

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:**

- Automobile use is essential
- Knowledge of Microsoft and Database software and products
- Advanced computer abilities

**PHYSICAL REQUIREMENTS:**

- 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. Reasonable accommodations may be made to enable individuals with disabilities to perform essential functions.
- The position demands significant community presence, including many night activities, luncheons and breakfast meetings.

Interested applicants should forward a cover letter and resume to [applicant@uwcnm.org](mailto:applicant@uwcnm.org) by Wednesday, September 8.

*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.*