ACTIONAID SOUTH AFRICA

ActionAid South Africa was established in May 2006 and is a part of ActionAid International, an anti-poverty agency working towards a world free from poverty and injustice.

Who we are

ActionAid South Africa is a nationally registered civil society organisation and proudly a part of the ActionAid International Federation—a global social justice federation working with over 15 million people in 45 countries around the world.

We work with people living in poverty and exclusion to build sustainable, people-centred and just alternatives to injustice and inequality.

Guided by feminist analysis and a human rights based approach (HRBA), we recognise the interconnections between people’s struggles for social transformation.

We ally ourselves primarily with grass-roots communities, youth networks, like-minded organisations and social movements to develop initiatives and campaigns that address the systemic drivers of poverty, injustice and inequality in South Africa.

Our Vision
A world without poverty and injustice in which every person enjoys their right to a life of dignity
Our Mission
To work with poor and excluded people to eradicate poverty and injustice
Our Goals
To see poor and excluded people and communities exercise their power to secure their rights
To see women and girls exercise their power to secure their rights
To see citizens across the world fight for their rights and against injustice
To make states and their institutions accountable and democratic and promote, protect and fulfil the human rights of everyone
### Job Description and Person Specification

<table>
<thead>
<tr>
<th>Job Title:</th>
<th>Donor Servicing &amp; Backend Data Management Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directorate:</td>
<td>Fundraising</td>
</tr>
<tr>
<td>Reports to:</td>
<td>Lead Individual Giving Manager</td>
</tr>
<tr>
<td>Direct Reports</td>
<td>NA</td>
</tr>
<tr>
<td>Location:</td>
<td>Johannesburg</td>
</tr>
<tr>
<td>Contract:</td>
<td>Fixed Term and renewable dependant on funding</td>
</tr>
<tr>
<td>Travel:</td>
<td>Less than 10% (Opportunity for local and overseas travel)</td>
</tr>
</tbody>
</table>

**Purpose of the Post**

ActionAid has been working in South Africa since 2006 to help eradicate poverty and social injustice. The Donor Servicing & Backend Data Management Coordinator is responsible for servicing our existing regular/monthly and once off donors and coordinating fundraising backend operations which enable us to achieve this important mission.

The incumbent will need to ensure robust data management and process development of the Customer Relationship Management (CRM) System and all integrated and other Fundraising systems.

In addition, the incumbent shall also be responsible for mining of information related to donor trends, market and competitor analysis as requested by line manager.

### Key Accountabilities / Responsibilities:

#### Data analysis

- Data Mining of CRM to provide regular key insights on donor trends and patterns taking into account various parameters
- Monitor, evaluate, collect and analyse donor data on key segments like location, age, gender, income-group, profession, qualification etc.
- Insight on specific segments on middle donors, major donors, corporate donors and sponsorship donors
- Responsible for dashboard and MIS on achievement and targets on daily and monthly basis that include ADS and CPD

#### Data management

- Data management and monitoring in CRM
- Ensure timely receiving of the batch’s files/invoice from agencies according to contracts
- Ensure donor details match the account information and entries are accurate in the CRM
- Ensure CRM data reconciliation is conducted timeline manner so that the status goes to the agencies on time to initiate claw back process.
- Ensure to send the monthly realised, bounce report internal & external.
| **CRM management:** | • Work in accordance with line manager ensure smooth functioning of CRM  
• Identify needs and guide the agency on module development / change requirements through coordination and support the service providers to develop the same  
• Prepare and generate periodic reports for Management Information System (MIS) and data analysis through the CRM |
| **Financial processing - Payment** | • Ensure timely and accurate reconciliation is conducted internal/external, same should match with AASA finance team.  
• Ensure debit instructions are accurate and as agreed timeframe, donor agreements and bank allowances  
• Manage and review process accuracy, quality and error-free completion.  
• Ensure timely payment of fundraising agencies and other vendors within due date  
• Ensure monthly reconciliation is conducted between finance MIS & Fundraising MIS Management Information System both financial reports are in sync  
• Ensure credit note come from agencies on time according to the claw back agreement  
• Ensure timely reconciliation and claw backs are in sync with agency agreement |
| **Agreement – Inventory** | • Ensure all agreements are in place of the vendors and service providers  
• Ensure timely renewal of the agreements  
• Ensure the stock of collaterals, donation forms, identity cards, and permission letters  
• Timely delivery of collaterals and donation forms to the agencies  
• Coordination with agencies on their requirements |
| **Donor Servicing and Project visits** | • Ensure welcome call and action outcomes reports are accurate  
• Ensure welcome packs/donor emails are completed as per schedule in CRM  
• Ensure donor journey schedule is followed as per schedule  
• Ensure Tax Receipts are sent according to schedule  
• Ensure Birthday emails go to the donors on their respective date of births  
• Ensure donor complaints are attended to quickly as and when they’re received and escalated & followed up accordingly  
• Keep a tab on termination, cancellation and donor delinquency (unpaid debit) rates and ensure that actions are taken to improve these rates to target  
• Donor refunds are submitted on time. Every effort should be made to retain the donors and all conversations must be documented and/or recorded |
• Organising the project visits for donors as per the agreed calendar
• Organising the project visit as per the requests from donors, subject to approval.
• Monitor the Donor Journey and it’s effectiveness, take actions with line manager to improve the donor journey experience.

### Person Specification

#### Education & Certifications
- Under graduation or university degree in finance, statistics, data management or a related field
- Advanced competence in MS office suite including data and financial analysis in Excel;
- Minimum 2 to 3 years of relevant and progressively responsible work experience, significant experience in managing similar job responsibilities
- Expertise in data management, analysis and donor/customer servicing particularly in relation to monthly/debit order donors/customers.
- Professional level competence in English.

#### Desirable Knowledge and Experience
- Formal certifications or experience in database management, CRM, Excel or data analytics
- Ability to work under pressure and meet deadlines;
- Ability to work with minimum supervision;
- Proven ability to work in multi-cultural environments;
- Accuracy and precision as related to numerical data;
- Advanced competence in the use of CRM databases; preferable;
- A strong commitment to develop, promote and practice AASA’s vision, mission, values and strategy.
- Clean and valid driver’s license;

Applications (CV and Motivation) must be submitted via email to: fundcomms.jhb@actionaid.org and cc to Manoharan.wilson@actionaid.org by 5th Aug 2019