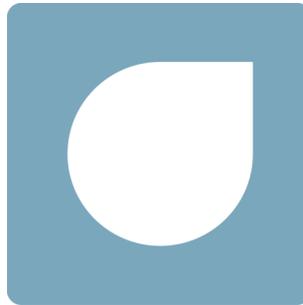




WaterAid/Joey Lawrence

# Job description

**Fundraising Data and  
Income Processing Officer**



**47-49 Durham Street, London  
SE11 5JD**

**Full-time,  
Fixed term contract (6 months)**



## About the role



### **Team description**

The Engagement Systems Team is one of two teams within the Performance and Insight Department. Working in close collaboration with colleagues in both fundraising and finance, the team plays a vital role in the management of WaterAid's funds, data and supporter service through day-to-day management of WaterAid's CRM and BI systems. This post reports to the Engagement Systems Manager.

### **Job purpose**

The Fundraising Data and Income Processing Officer plays a crucial role in ensuring that key processes are efficiently maintained, executed and monitored, with a focus on streamlining and improving ways of working. Additionally, the role holder will help to coordinate the team's day-to-day workloads, whilst working with the Engagement Systems Manager to ensure the team are working to consistently high standards. Working with colleagues in Fundraising and Finance, the Officer ensures that data requirements are understood and delivered. In addition, the post-holder must also ensure that WaterAid complies with the associated rules and regulations of BACS and HMRC, and work with colleagues in other teams to ensure they have a good understanding of the requirements.

# Accountabilities



## Accountabilities

### Team Responsibilities

1. Supervise the workload of the team, ensuring that daily, weekly and monthly tasks are planned out and completed according to set deadlines;
2. Work with the Engagement Systems Manager to monitor the workload of the team to ensure work is evenly distributed, deadlines are met, and peaks and troughs in workload are managed effectively;
3. Be responsible for collating and monitoring the team's Key Performance Indicators (KPIs) and highlight to the Engagement Systems Manager any areas for improvement;
4. Deputise, as appropriate, for the Senior Officer and Engagement Systems Manager;

### Process Management

5. To be responsible for the administration of Direct Debits, including the successful running of the Direct Debit collection process, and ensure the management of these processes are in line with the rules of The Direct Debit Scheme;
6. Run, audit and submit the monthly, quarterly catch up, sponsorship and envelope Gift Aid claims to HMRC;
7. Take responsibility for the integrity and accuracy of the data held within the CRM system by running a regular programme of data cleansing work;
8. Coordinate the import of data files into the CRM System from various agencies, ensuring the data is loaded in a timely manner and any issues are fed back;
9. To be responsible for ensuring the month-end reconciliation process is completed, ensuring Finance receive the relevant files on time, and that any checks have been Accountabilities carried out to ensure the accuracy of the data;

### Key relationships

10. To work closely with Fundraising and Campaigns teams to understand their processing and fulfilment requirements, taking responsibility for managing the delivery of particular activities where appropriate and briefing the Engagement Systems team on any upcoming activity;
11. To work closely with the Supplier Partnerships Officer and Supporter Care Officer to ensure our internal processes are working effectively, and we are making the most of the opportunities to outsource work to our fulfilment agencies;
12. To work closely with the UK Finance Officers to ensure the month-end reconciliation process is seamless, and where any issues do arise these are quickly resolved;
13. Develop and maintain effective working relationships with other departments, ensuring an integrated approach, mutual learning and effective use of resources;

### Approach to work

14. To be knowledgeable concerning best practice for Direct Debits and Gift Aid and be able to offer training and guidance to other teams and departments;
15. To ensure the team comply with WaterAid's Data Protection guidelines when it comes to the handling of supporter information;
16. To actively seek opportunities to develop and improve business processes, updating and improving internal procedural documents;
17. To undertake any other reasonable tasks as advised by the Engagement Systems Manager

# Person specification



## Essential skills

- High attention to detail with ability to work methodically, ensuring minimal errors, and able to problem solve should errors arise
- Experience of coordinating team duties, with an ability to use initiative to prioritise effectively and provide support to colleagues
- Experience of inputting data quickly with a continuously high level of accuracy
- A team player, with experience of building positive and effective working relationships across teams
- Ability to use initiative to find better ways of working, sharing ideas and implementing improvements
- Knowledge and experience of BACS Direct Debit processes and HMRC Gift Aid regulations
- Significant experience of using CRM systems and working with large and complex data sets
- Strong IT skills, with advanced experience of using Microsoft Excel and Word
- A Level or equivalent education, with English and Maths GCSE

## Desirable skills

- Experience of using Microsoft Dynamics CRM
- Working knowledge of writing SQL Server queries and/or SSIS
- Experience of running data cleansing checks and implementing data integrity principles
- Experience of delivering internal training