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Report title: Fundraising Manager update	Author: Katherine Bavage, Fundraising Manager
Date: 17 November - Agenda	Status: For Information

Report description: Summary of major areas brought up to speed on in last two months in post, and forthcoming areas of work.

Projects from the last two months

Civi CRM

Regular gifts from direct debit donors are now accurately recorded in the database on a monthly basis, as are the few paypal gifts not populated via on API (a big that needs fixing). The appointment of Developers should mean that the platform will be transferred to Drupal soon, and my two days of training plus attendance at Civi Con 2012 can be put to better use. Next step will be arranging the automation of thank you emails.

Gift Aid

The claim for single gifts for November has been reviewed by HMRC; we are expecting a cheque shortly. This was submitted as a 'test' claim – when completed I will proceed and catch up the remaining claims for single gifts, and claim for direct debit gifts. There is a large volume of work in doing this, which will hopefully be supported by the Office Support Administrator post.

Fundraiser Agreement

Focused work on complying with the obligations has produced a series of draft policies on data security, and additional risk review work which will be an ongoing focus in the coming months.

Donor communications

This work has been delayed partly as a result of a focus on membership strategy, but mostly due to our changed circumstances and negotiations with the Foundation about how to avoid undermining the Fundraiser OR our position. Working with Stevie and communicating with WMF. High Value donors received a pin badge and thank you mailing to celebrate our anniversary.

Projects in the next two months

Visiting Wikimedia Deutschland

Both to observe their office and team during the fundraiser, and to discuss membership and development work – lessons learned and plans for the future.

Membership planning

Should the board accept my proposed strategy, drawing together a plan and trialling regional recruitment and e-newsletters will be an ongoing focus.

Donor data

Pending agreement about when we talk to donors and how, there is ongoing work needed to cleanse our up to date data, and undertake further analysis and segmentation.

Development

An in-person meeting with two contracted developers is now planned to take place, preferably prior to the board meeting. This will allow for contracts to be signed, and a technical specification to be drawn up for the work. It will also allow a broader discussion of how these roles' can support the office when the 'task and finish' element is over – something that has already been discussed with Mike and Doug and hopefully can be picked up by a Technical Committee if formed.