

Report title: Fundraising Manager Update	Author: Fundraising Manager
Date: 11th May	Status: Decision - Approve: Website Privacy Policy Approve: Amendment to Data Protection Policy Approve: Report and Recommendation re Membership approval process
Report description: Staff report to Board	



Projects from the last three months

Civi CRM – Still not migrated, combination of troubleshooting installation and KB needing time to bugtest. Looking to have migrated by end of May, and set up other staff accounts and training session.

Gift Aid – Have registered with Charities online but now awaiting confirm of CHV1 changes being implemented before submitting next claim. KB working on data file – single gifts ready, direct debits – still working on accurate import of all between Sept 12 – Jan 13.

Fundraiser Agreement – Work on privacy policy and database supporting readiness. Need to look at Donor Privacy policy in terms of a complaints process. Will need to renew data protection insurance in August.

Donor Communications – First donor newsletter and survey distributed after A/B test. Results on wiki. Planning next edition post discussions with WMF.

Membership planning – numbers rose, then fell again due to expiries, despite reminders. We need to move on with new members pack but no community input. To discuss with KTC.

Development – ongoing. Tech committee met 18th April, next meeting at AGM.

Projects in the next three months

Donor data – Data cleanse. Currently reviewing data agreements with three organisations – will then provide sample for them to analyse, seek quotes and request board approval of a recommendation.

Donor strategy – Been delayed by competing work around membership and development. Have agreed some delegation of this work so can refocus time on planning for events, direct mail and payroll fundraising. Will be informed by discussion with WMF staff.

Financial processes – Waiting to start formal monthly reconciliation processes; completing transfer to own Service User Number (will reduce cost of payment processing fees for direct debits)