

Report title: Fundraising Manager update	Author: Katherine Bavage, Fundraising Manager
Date: 7 – 9 September - Agenda	Status: For Information

Report description: Summary of major areas brought up to speed on in first two months in post, and forthcoming areas of work – with primary focus on supporting the Fundraiser

Projects from the last two months

Civi CRM and Donor Data

I have been working to get the scope of our existing data quality and completeness, and a good understanding of the functionality of Civi CRM – this will be completed by a two day end-user training course on 17/18th September. This will allow us to better analyse and segment our donor data – including establishing direct debit attrition rates and patterns of regular giving during the 2011/12 Fundraiser.

Gift Aid claim

A claim for our first eligible period (03-11-11 to 31-01-12) for all single gifts is substantially underway. The process was complicated by cross referencing a large volume of donations with eligibility to claim gift aid. A gift aid claim for all regular gifts will follow and be an even larger job

Fundraiser Agreement

Other than the delay in relation to the audited accounts, the obligations for the 1st September deadline were met. The Foundation did not request banner testing, however a planned programme for this will begin shortly.

Donor communications

I will be launching our first donor survey and testing e-newsletters, with the intent that by the end of 2012 we will have feedback from these activities, and communications with Donors throughout the fundraiser, to propose a donor communications strategy with measurable and realistic KPIs, which can be developed in tandem with the process of the 2014 activity plan.

Projects in the next three months

Banner and landing page testing

I am now awaiting WMF wiki and meta admin access rights – when in place I will work with Peter to develop and implement a testing schedule. A call out for stories from UK editors will be going out to the UK list linked to a page on our wiki. Meanwhile it may be that until I have access the Foundation will conduct our first test or two which will be very basic (mostly layout testing)

Fundraiser specific communications

I will be working at developing a costed schedule of communications for the Fundraiser, including possible re-design of email templates (launch, final push and thank you) and direct mailing material. The intention is to attempt more extensive testing of the launch email if possible this year.

Civi CRM development

The timescale for contracting development work to see our payment processor for direct debits API integration with Civi CRM is now considerably behind. I will be working to ensure we deliver API integration as soon as possible to allow infrastructure testing – it is anticipated if this is successfully in place for the fundraiser this will greatly assist our ability to provide up to date accounts of sums raised via Civi CRM, and perhaps more crucially, thank donors promptly.

Foundation and WMDE

It is intended I will visit WMDE before the end of October 2012, and the Foundation in early 2013.