

Report title: Fundraising Manager update	Author: Katherine Bavage, Fundraising Manager
Date: 9 February - Agenda	Status: For Information
Report description: Summary of major areas progressed in December '12 and January '13, and forthcoming areas of work.	

Civi CRM

A parallel install on a Drupal platform and most up-to-date version is [being built](#). Work to bug-test this before and after migration of data will take place in February. Following this the installation of Gift Aid and Smart Debit extensions is high priority.

Gift Aid

The claim for single gifts for November is still being reviewed by HMRC. KB has chased at monthly intervals by 'phone. Data for the remaining claims is being prepared in anticipation of feedback on this claim and will be swiftly submitted. Further development work will be done to accommodate HMRC's new arrangements for making claims from April.

Fundraiser Agreement

IT security review ongoing, staff training and physical security audit due to take place on 6th February. Policies on wiki have attracted little comment from the community, but will be considered by the Technical committee. A check-list for Trustees to be drafted for inclusion in Trustee induction. KB to raise question of new negotiations for 2013 Fundraiser in March.

Donor communications

High Value donor mailing resulted in three large gifts, KB to undertake a fuller analysis. All donors with a valid email, a past donation of any amount and no opt-outs were emailed on 28th January to announce advertised job posts and pre-announce donor newsletter. First donor newsletter [being drafted](#), planned for mid-Feb with link to [donor survey](#).

Visit Wikimedia Deutschland

Took place on 4th - 6th December - inspiring and reassuring that we are thinking about the right approaches. – Report being completed but will be complete and on-wiki before 9th February.

Membership planning

New members packs [in development](#), new members forms and trialled at Coventry meet-up, first member newsletter delivered and these will be monthly henceforth. Next goals will be setting up some Lincolnshire-focused recruitment and adding a 'Join us' page to donation workflow as WMDE have.

Donor data

Data cleanse agreed in 2013/14 budget. KB will be seeking quotes and making recommendations in March.

Development

Going well – held [first of monthly progress meetings](#), and first meeting of Technical Committee. Minutes and agendas on UK Wiki. Working on a better bug tracking and project management software to support the work and reporting (likely to be [Bugzilla](#))

Donor Strategy

Planning for how to develop a strategy in a public process (not typical for a marketing plan) Intending to draft on wiki through February. Will have to be robust about a focus on key areas as don't have the capacity for a broad fundraising programme over multiple income streams, and its important our community understand this and buy into the priorities we chose to pursue.

Work Plan

Created detailed annual work plan that underpins quarterly reporting and KPIs as detailed in FDC reporting and planning grid. Aiming for four 'green' quarterly updates :D