

Quarterly Reporting

Advancement Department

Q3 - 2014-15

Fundraising, Lisa Seitz Gruwell, Q3 FY 2014-15

Objective	Impact on Goal	Dependency	ETA	Status
<p>Raise \$3 million in Q3 primarily through:</p> <p>1) Banner and Email campaigns in Israel, Hungary, Sweden, Denmark, Norway, and Spain.</p> <p>2) Foundations, Major Gifts: Send out annual report; Send proposals to four new institutional donors and secure a multi-year commitment from one new funder</p>	Raise \$58.5 million in FY 2014-15	Site traffic; Institutional donors; Communications for the annual report	3/31/15	Done. All country campaigns were completed. Raised \$7 million, exceeding the goal. The final number is still settling.
Research: Complete a study of our December fundraiser using a professional public opinion research firm	Develop a strategy for the long term financial health of the organization	Research firm	2/28/15	Done; Released on Signpost
Implement payment processor for China; Prepare to implement payment processor for Latin America in early Q4	Raise \$58.5 million in FY 2014-15	FR-Tech; China Vendor and LATAM Vendor	3/31/15	Complete
<p>Partnerships:</p> <ol style="list-style-type: none"> Hire a VP of Partnerships Write a partnerships plan 	Develop a strategy for the long term financial health of the organization	Recruiting	3/31/15	VP of Partnerships has been hired! We have an initial six month partnership plan to be refined further next quarter.

Advancement

Quarterly Objectives
Success

The Advancement team has exceeded our annual fundraising goal by 14%. We have raised \$66.4 million by the end of Q3 2014-15. Our annual goal is \$58.5 million.

The Advancement team has exceeded our quarterly fundraising goal by 133%. We raised \$7 million in Q3 2014-15. Our quarterly goal was \$3 million.

All teams within Advancement have contributed to this success. Both Online Fundraising and Foundations and Major Gifts have exceeded their individual team goals.

Advancement

Quarterly Objectives
Miss

We need to further develop our partnership plan.

Example:

We did not complete the partnership plan by the end of the quarter. We did hire our VP of Partnerships just before the close of the quarter. We will be working to develop a comprehensive partnerships plan next quarter.

Quarterly Goals and Reporting: Fundraising Tech

Q3 - 2014-15

Q3 - Fundraising Tech

Quarterly Objectives Summary

Objective	Impact on Goal	Dependency	ETA	Status
PCI Compliance Assessment	Security	External PCI consultants	2/15	Done. Exceeded.
New payment method: China partner	Enable fundraising in China		1/15	Done. Disabled for legal reasons.
Start new 3rd party integration: LATAm partner	Enable fundraising in Latin America		3/15	Started coding.
Upgrade for nightly reconciliation file parsing with current vendor	Security		1/15	In progress.
Ongoing refactoring and code hygiene improvements in Donation Interface whenever possible.	More flexible (borrowed) and happier developers		3/15	Phase 1 complete.
Reporting Improvements <ul style="list-style-type: none"> • Improvements to CentralNotice tracking • A/B components for the internal dash • Custom civicrm reports (to be upstreamed) 	Increase visibility	Vendor for CiviCRM Release Engineering - support continuous integration	3/15	In progress.

Q3 - *Fundraising Tech*

Quarterly Objectives
Success

- **PCI:** The assessment (using an external vendor) is complete and we've begun implementing the recommendations [[4](#)].
- **China Partner:** We implemented our China Partner in January, but our account was disabled by the processor as soon as it became operational due to legal changes on their side.
- **DonationInterface refactor:** We accomplished the first phase of our goals, and are beginning the exciting second phase. See [[1](#)] for the roadmap.

Q3 - *Fundraising Tech*

Quarterly Objectives
Miss

- **LATAm Partner:** This goal was to “start”, according to the master goals doc [2], but this is squishy (and was misrepresented in the QR), hence a “miss”. We are now in initial phases of implementation and plan to finish this quarter. This is our top-priority Q4 goal.
- **Nightly Reconciliation:** Deprioritized due to sliding upstream deadlines.
- **Reporting improvements:** The subgoals are each in progress, but this goal as stated was too ambitious.

Appendix 5: Fundraising Tech

[1] https://www.mediawiki.org/wiki/Extension:DonationInterface/Refactor_2015

We have a detailed roadmap of how we plan to improve this extension. The end goal is to componentize, and get the quality up to the point that we can find other multinational NGOs who want to use our software.

[2] https://www.mediawiki.org/wiki/Wikimedia_Engineering/2014-15_Goals#Fundraising_Engineering

Our team's master goals document.

[3] https://www.mediawiki.org/wiki/Extension:CentralNotice/Notes/Campaign-associated_mixins_and_banner_history

CentralNotice plans.

[4] https://collab.wikimedia.org/wiki/Fundraising/Engineering/PCI_Gap_Assessment_Feb_2015

PCI gap assessment and recommendations.