

Harlequin system provides bedrock for growth at Age UK Leeds

With plans to expand the charity and build fundraising income, Age UK Leeds knew that investing in a database would be a crucial early step in their journey. Now Harlequin is helping transform everyday processes and equip managers with strategic information. Key fundraising activities have been set up on the system and the charity is nurturing closer donor relationships.

Background to charity: Age UK Leeds is an independent charity belonging to the 300+ strong federation of Age UK. They provide services and activities for older people in the metropolitan district of Leeds. The charity went live on their Harlequin system in March 2010 with a single user licence, initially for their fundraising manager. With a new CEO in post a new phase of growth is underway.

Size of database: 700 supporters and members.

Fundraising target: £80k in 2010.

Previous system: paper based.

Jo Shephard, the first ever dedicated Fundraising Manager at Age UK Leeds, describes how she used her experiences from larger charities and commercial marketing to implement a new database.

When and why did you decide that you needed a new system?

I joined the charity in January 2010 and my first task was to find a new database. Years of donation information was held in a paper based archive of receipt books. It was the first time we had been so proactive

“ Right at the start of my new role, it was a massive benefit to have had the choice, budget and support to find a new system ”

about fundraising and the Trustees had the foresight to see that a database would be my central tool.

What did you want to achieve?

Finding a new system was about creating a strong, sustainable core for the charity that would support our planned growth. As well as improving everyday efficiencies and building stronger relationships with donors, we knew the information our data would yield would influence our strategic plans now and into the future.

What process did you follow when looking for a new supplier?

From start to finish, the process took three months. In January, I began to search the web and called a range of software suppliers. All were specialist providers to charities. Whilst one sent a malfunctioning CD and another sent web links that didn't work, Harlequin came to see me face-to-face. We met again at the IoF Yorks Conference, which Harlequin sponsor each year. At the end of February we had made our decision and by the end of March the system was installed.

Why did you choose Harlequin?

As a lone fundraiser, it was imperative that both the functionality and aftercare support were there – it was not just about cost. The software is easy-to-use and intuitive, and there are extra add-ons for when we need them. I could see that the system would

Tip: to get the best solution for your money, confirm your budget asap. Ensure Trustees are aware of the realistic costs and benefits of such software.



Jo Shephard, Fundraising Manager (right)

grow with us and not hold us back. The team kept in constant contact with me during the decision making process and developed a friendly relationship very quickly; it was clear they understood us and were keen to help me. I really appreciated that they took the time to visit me and explained things properly in plain English. Even if the best known brand was just £1 more, I would not have chosen them.

What advice might you give another charity looking for a new database?

- Confirm your budget as soon as possible.
- Take a good look at your data; it pays to spend time cleaning it up before you import it into your new system. If you put rubbish in, you get rubbish out!
- Think about change management; be patient and be prepared for a period of internal change. Involve your colleagues who fear technology.
- Avoid outlandishly large systems that you will never use and choose a system that can expand as you do. Also avoid thinking you can do it all in Excel and Outlook – this will become limiting.

How was the installation and what is your experience of customer care?

The team at Harlequin were there every step of the way. After they imported our data, I had two information-packed days

Case Study

of training in my office. This was based on how I wanted to work in the future. The telephone support is brilliant; I called virtually every day for a few weeks to ensure I was on track and patience never ran thin.

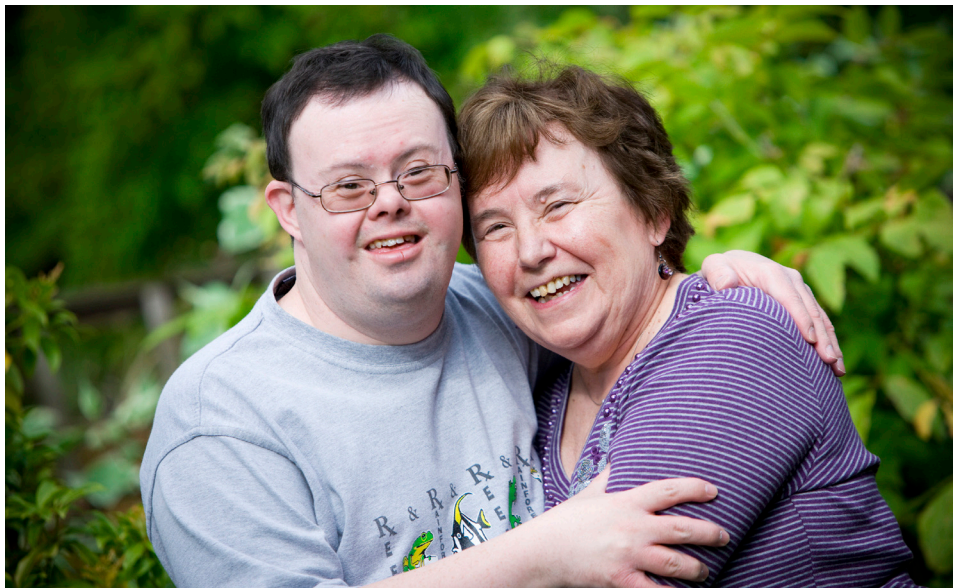
What challenges did you need to overcome?

It took four weeks to sort out our data as most of it was hand written; however, this was such a valuable use of time. Collating everything into a single spreadsheet made the data conversion very smooth and I was able to get a good look at what we had - we only imported clean, relevant data onto our new system.

How do you use the system?

- **Contact management:** everyone is on the system. I store as much information as needed against each, including copies of the communication we have had. I am building up profiles by initially adding interests and linking people together. I can set reminders to contact people.
- **Donation logging:** income is logged on a donation screen against each contact. We track income from different campaigns and can see who gives what at a glance. Gift Aid declarations are also recorded.
- **Event management:** we use the system to project plan events: allocate tickets, record participants, issue communications and record income and expenditure.
- **Targeted lists:** it is easy to extract lists of people we want to contact. These can be lists of names, emails, telephone numbers or address labels; they can be tailored, for instance, to people in a certain area. We can also do mail merged letters straight from the system.
- **Reporting:** using standard queries in the system, I feedback to the CEO and Trustees the success of fundraising, and produce banking and Gift Aid reports.

Tip: Involve office volunteers in shaping your new administrative processes; ask them what wastes time, think how software can automate this and ensure they are trained on the system.



Age UK Leeds carer, Shelia, with her son Craig

Tell us more about your events?

The Big Knit is an annual fundraiser – people knit hats for Innocent smoothies and we receive a 25p donation for each sold. This year, in our area, 40 groups and individuals made 4,000 hats - compared to 700 in 2009. I created an 'Event' in Harlequin to co-ordinate everything. Participants were linked to their groups and the event, and all communications were issued, including a promotional mailing and thank you letters. I now have a blueprint for next year which provides a platform to grow numbers even more. As each person was recorded with an interest in knitting we can contact them about other crafty events. I also used Harlequin to oversee our Carol Service, which attracted 167 people. Event costs were logged in the budget screen, as well as donations associated to the event and individuals. Tasks were allocated and volunteers assigned, so I felt in tight control throughout.

What are the biggest benefits the system has brought to your organisation?

- **Centralised system:** moving from a paper based system to a computerised database ensures we are more organised, future-proof and sustainable.
- **More efficient ways of working:** the system is easy-to-use and underpins

“ The system is easy-to-use and intuitive. ”

speedier, logical ways of working.

- **More strategic insights:** it is a relief to have an interactive system that you can extract business reports from.
- **Enhanced donor development:** the donation and communication management, along with the profiling tools, is helping us know our supporters better.

What are your plans for the future with regard to technology?

We are halfway there – ready for our next stage of growth. With our new CEO, we have an invigorated drive to push forward with IT. We are setting up a new network across three offices so more people will have access to Harlequin including the reception and admin teams. Our new Head of Finance and I will make use of the link between our systems so we work effectively together. We will maximise the reporting tools to ensure we are as informed as possible about management decisions. We will continue to build strong relationships with our donors.

What three words best describe Harlequin?

Professional, friendly, efficient