

Harlequin helps forge new era of fundraising at Florence Nightingale Hospice Charity

With many manual processes and a creaking in-house system, the Head of Fundraising at Florence Nightingale Hospice Charity (FNHC) had a clear vision that a new database would radically benefit the organisation. Now, the department is less cluttered, processes are more streamlined and their first large scale event (the Midnight Walk) was a magnificent success.



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

- **Closer relationships with supporters and shared knowledge between staff:** having a complete record of all communications and donations ensures everyone feels valued. Now when someone is fundraising for us, we provide a closed-loop service: we send out good luck emails and thank you letters; update communications records, preferences and interests; and tell them about other relevant fundraising. For example, younger supporters want to promote us in modern ways including Facebook. Now, all our information is in one place (rather than in a fundraiser's head or in-tray) which is imperative for our job-sharers and volunteers. We also have greater visibility of the relationships between people on the system; for example, the many large families of supporters are now properly linked together.
- **Improved processes and task management:** compared to three years ago, we have 60% less paper files in the office. In the morning everyone logs onto the system; we view outstanding actions, follow set processes, personalise template documents and allocate tasks to colleagues. Management reports for meetings now take minutes to compile.
- **Saved time on Light up a Life admin:** each year many people dedicate lights on our Christmas tree to a loved one.

Background to organisation: for two decades, Florence Nightingale Hospice has supported the people of Bucks, Beds and parts of Oxon. FNHC pledges to provide £450,000 towards the costs of the hospice every year. They fully fund Florrie's Children's Team - The Children's Hospice at Home, Lymphoedema Clinic, Day Hospice, Volunteers and their support, Bank nurses – providing holiday and relief cover in the In-Patient Unit plus part-funding of the Community Palliative Care Nursing Team and all the other small enhancements that make hospice care so special. There are five members of fundraising staff (full-time and part-time), as well as five regular office volunteers. They went live with Harlequin Fundraising in July 2009.

Size of database: 8,000 contacts on Harlequin.

Region: Aylesbury, South England.

Previous system: in-house, bespoke system based on Access.

Fundraising managed on system: Campaigns, Events, Individual Supporters, Corporate, Community, In Memoriam, Light up a Life, Collection Tins and Legacies.

Talking about their journey so far, Lindsey Fealey (Head of Fundraising at FNHC) tells Kate Ellis (Director at Harlequin) why they needed a new system, how they make best use of their investment and their plans for the future.

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

On joining the FNHC in 2007 it was apparent that the current database, FRED, was causing frustration. FRED had been written especially for us years before and, at the time, met the charity's needs; however, the technology was not evolving and it was simply time to change.

What advice might you give another charity that is looking for a new fundraising system?

You will need to obtain buy-in from a range of stakeholders, which may take time. A formal business plan helped convince our finance team and trustees about the viability of investing in a new system. I included costs from a range of suppliers and highlighted that increased income would be an end result. Staff may be reluctant to change; talk through concerns, focus on the long-term benefits to the charity and enthuse "we need to make time to save time".

Tip: Invest time to tell all staff about the benefits of a new system – a presentation is a super way to do this; include case studies about other charities in your sector if possible.

“ Compared to three years ago, we have 60% less paper files in the office. ”

Case Study

Florence Nightingale Hospice
Charity Management and Fundraising



Installed in time for the launch of last year's appeal, we used Harlequin to despatch leaflets, log income, record dedications, send out confirmation cards, organise the ceremony and collate the Roll of Honour books. With the Light Up a Life module, labour-intensive admin time has been halved. We were also able to analyse the impact of adding a 'Make a donation' line to the leaflet.

- **Greater confidence in major event management:** without Harlequin, I am sure our first Midnight Walk would not have been as big as it was. This event has also brought the team enhanced credibility with outside agencies and has given us the vision to plan more high profile activities. The Trustees now have a greater appreciation that a robust IT infrastructure is a must to future-proof the charity.

How do you use the software to manage your fundraising events?

A good example - in July 2010, we organised our first Midnight Walk. Using the Event module, we co-ordinated an expanse of activity: 500 walkers registered to take part pledging over £50k; teams were set up on the system and participant numbers allocated; registration packs, training guides and t-shirts were issued; personalised labels and letters produced; certificates collated; corporate sponsorship managed and income and expenditure tracked. At any stage we could check the progress of the event and forecast income. With Harlequin, we have created a great springboard for other major events.

Why did you choose Harlequin?

- **User-friendly staff:** other companies we spoke to seemed very black and white and corporate - we like 'touchy, feely, cuddly'! The independent, family-style-business of Harlequin appealed to us.
- **User-friendly software:** the Harlequin system is easy-to-use and many customers vouch for this. At the time, we visited other charities, including those using competing software, and saw firsthand that Harlequin works well in practice.
- **Value for money:** with Harlequin you get good quality software and services



Lindsey Fealey (centre) and members of the Florence Nightingale fundraising team

at an affordable price. Some systems are shockingly expensive.

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.

What are your experiences of customer care at Harlequin?

We know we have friends at the end of the phone. It doesn't matter how many times we ask something, we are treated with patience and integrity. Harlequin have taken the time to understand how we operate and strive to ensure we are making the most of our system.

What are your plans for the future?

Over the next year we will run all campaigns in Harlequin, polish processes even more and tidy up our historic data. Taking a phased approach, we have not tried to do everything at once. We will bring our heavily paper-based Friends and 50/50 club into the system, and make use of the Volunteer module (we have 300 on our books). When it comes to writing next year's fundraising plan, I shall make good use of the reporting and analysis tools. With

Harlequin, there are more benefits than we could have ever considered and there is still much we can embrace to improve the way we work.

“ Without Harlequin, I am sure our first Midnight Walk would not have been as big as it was, with 500 participants raising 50K. ”

To you, what three words best describe Harlequin?

User-friendly, reliable and flexible.

Find out more about Harlequin Software

For details of our forthcoming regional events or to book a demonstration at your office or enquire about pricing please visit www.harlequinsoftware.co.uk or call us on **01672 541541**.