

## RMHC fundraisers and staff from the Ronald McDonald Houses all connect with Harlequin

Faced with a redundant system, Ronald McDonald House Charities (RMHC) embarked on a project to re-invent their approach to data. With their Harlequin database they now have a joined-up network of Ronald McDonald Houses, offices and contacts that has enhanced the family experience when booking in to the Houses and boosted fundraising.

**Background to charity:** Ronald McDonald House Charities is an independent Charity which aims to provide free 'home away from home' accommodation for families with sick children receiving treatment at hospitals across the UK, enabling them to stay close to their child and maintain a degree of normal family life.

The charity has achieved a lot in the last 20 years. 14 Ronald McDonald Houses have been built which, along with 29 sets of Ronald McDonald Family Rooms, provide 400 bedrooms every single night of the year. However, there is still a great deal to do. Many families still have to sleep on camp beds or in their cars in order to be close to their children, and RMHC is determined to help as many of these families as possible.

The Charity's biggest source of income comes from the collection boxes in McDonald's restaurants, through which customers give millions of pounds each year. In addition, McDonald's employees and suppliers support the Charity by organising fundraising events and donating their personal time. The company and its Franchisees also make a generous yearly donation to the charity from their profits.

16 users went live on the system in August 2008; two years later RMHC have 40 licences.

**Size of database:** 18,000 contacts

**Region:** UK wide

**Previous system:** other charity system, spreadsheets, paper

**Who uses the system:** staff who work in the Houses, and the fundraising, management and administration teams.

Drawing on 16 years of charity management experience, Jo Hodges (Head of Fundraising) shares how she championed the RMHC database project and the benefits it brings.

### Why did you need a new system?

*On joining the charity, I found we had an obsolete database and 18 years worth of information in various places. Unwieldy and difficult to use, no-one understood the software and a paper based process and spreadsheets had evolved. After trying to resurrect the system, I was forced to look elsewhere as the supplier was unable to develop the software to our changing needs or offer tailored training.*

### What did you want to achieve?

*The vision was of an easy to use, flexible database that everyone would use every day; a central hub for the charity fulfilling different functions. As well as the main contact database, we wanted House teams and fundraisers on the system to enhance their work. It was imperative we found a partner who would adapt to us with easy-to-use software that was not extortionately expensive.*

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

*Aware of the main players in the sector, I invited three companies to our head office to*

**Tip: Create a group of key personnel from each team to help drive the project forward. Get buy-in from the top; with the CEO onboard others will readily follow.**



Jo Hodges, Head of Fundraising, RMHC

*'pitch' their solutions. I involved relevant colleagues to ensure all requirements were covered. To make my recommendations, I compiled a report for our Trustees covering essential features, value for money and user-ability.*

### Why did you choose Harlequin?

*In my time, I've come across and used a range of databases. From working with Harlequin before, I had confidence that their software and friendly approach best suited RMHC. Unlike the other suppliers we met, they listened to us and, at a realistic price, were able to offer an integrated system for our head office, Houses and fundraising team. As part of this, they were happy to do specific development work. I believe Harlequin offer the best fitting solution for any smaller to medium sized charity.*

### What advice would you give another organisation looking for a new system?

*Be realistic about your size and what you want the database to do now and in the future. Some systems have been designed with the top charities in mind and may leave organisations with smaller workforces with a sprawling, expensive package and superfluous functionality. Choose an established company with a strong user group and software that will progress and not hold you back – this way you will avoid having to start again.*

# Case Study

Ronald McDonald House Charities  
CRM, Fundraising and Service Delivery



## How do you use your Harlequin database?

For complete contact management Harlequin spans our entire organisation: families who stay in our Houses, supporters/prospects, McDonald's restaurants, franchisees and suppliers are all entered. Each home has a tailored, secure view of the database showing their relevant contacts. Head office staff and managers have a complete view of the system to oversee communications, extract strategic reports, produce Gift Aid claims, analyse data and manage national campaigns.

- **Our Home-from-home accommodation:** as families arrive - often with just the clothes they are wearing - staff record their details and allocate rooms. We also track when families move to other Houses and hospitals. Parents can form close bonds and the system enables us to place families together; for instance, if their children are having the same treatment. All communication is recorded and each House despatches a quarterly newsletter and manages their local events on the system, such as dinners for supporters in the area.
- **Fundraising:** all donations are logged on the system. Each type of fundraising is managed by relevant modules and features: Grants, Legacies, Events (including golf days and challenges), Major Donors, Community and Corporate. Promotional items are allocated, such as collection tins and banners. Merchandise is also tracked.
- **Restaurants:** across the UK, we record and report on the income from collection tins. In addition to producing certificates, this helps create healthy competition!

## Can you summarise the key benefits the system has brought to RMHC?

- A more joined up and organised service for families.
- More robust funding applications, reinforced by figures from the system, such as the number of families supported each month in certain areas.
- Integrated data, streamlined processes and a more united organisation.



Jo Hodges and the Ronald McDonald House Charities Team

- Ready access to project planning and cost management tools.
- Strategic insights help with management planning; we have undertaken feasibility studies for capital campaigns, including wealth analysis on existing donors.
- Improved donor development; we now know who our supporters are and have more accurate profiles about them.
- Gift Aid is managed efficiently; we were able to claim on back-dated sponsorship.

**Tip: Ensure a clear commitment to use the database is part of all job descriptions. When new people join, immediately train them on the system.**

## Describe your experience of the installation and aftercare support?

The Chief Developer visited a range of locations to ascertain our requirements and to amass data. As our key contact, he was patient and quickly understood our needs; we encountered a few hurdles as some facilities are based in hospitals and we needed to access NHS networks. We were pleased to have tailored training on our own data. The support team work well with our internal Harlequin expert. I enjoy participating in user group events and helping to shape the future of the software.

## Do you have any best practice to share?

From the offset, we created a group of key personnel from each team to keep the project moving forward. To encourage widespread ownership, a clear commitment to use the database is part of all job descriptions. We are creating a guide on data entry to ensure consistency – the data you get out is only as good as you put in. When new people join, we quickly train them on the system. We organise focused training in quarterly meetings – this helps flush out issues and smooth processes. We have identified an internal Harlequin guru who the team turn to with basic questions.

## What are your plans for the future?

We have recently invested in licences for all frontline staff so are rolling out training and setting up remote access. We need to do an annual data health check and de-dupe, and are planning more major donor screening. We will also be using the Volunteers module. Work on the database is an exciting, ongoing process.

## To you, what three words best describe Harlequin?

Flexible, user-friendly and progressive.

“ Harlequin offer the best fitting software for any smaller to medium sized charity. ”