

# ■ Case Study

## Alder Hey Children's Charity manages third major appeal in ten years with Harlequin Software

In 2013 the Alder Hey Children's Charity embarked on a major fundraising appeal to raise £30 million towards the new 'Alder Hey in the Park' children's hospital. In addition to the daily management of the fundraising department, this appeal is their third major campaign in ten years to be managed on the Harlequin CRM & fundraising software.

### Alder Hey Children's Charity CRM & Fundraising



#### **Background to organisation:**

The charity supports Alder Hey Children's Hospital which helps over 270,000 young patients and their families every year. Their current fundraising appeal is to raise £30M towards the new 'Alder Hey in the Park' and will provide life-saving medical equipment, arts and play activities and funding for vital research.

**Database size:** 36,000 contacts.

**Region:** Liverpool, North West.

**Previous system:** another specialist fundraising package.

**Types of fundraising managed on system:** Campaigns, Events, Appeals, Community, Corporate, Major Donor, Running, Merchandise, In Memoriam, Gifts in Kind and unsolicited donations.

Sharing tips and insights, Tom Ellis (Managing Director at Harlequin) talks with Anne Hodgson (Operations Manager) and Helen Hughes (Fundraiser) about why they needed a new system and how they make best use of their investment.

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

*In 2003, we were in the final stages of our Rocking Horse Appeal. To move things forward we needed a system that would provide a proper reporting structure, allow income analysis and capture all donor information. We were unhappy with our old supplier and couldn't see the value of upgrading. Everything we wanted was in the Harlequin system and we could readily see the benefits it could bring. Since 2004, Harlequin has been integral to our everyday fundraising as well as our major appeals and will be the bedrock of our latest 'Alder Hey in the Park' appeal.*

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

*In reality, many systems are fairly similar – the quality of customer support helps separate suppliers as well as the added value they can bring to your organisation. As you will be working together for many years, it is imperative that you get to know the company and be sure you can build rapport with their team. Will you feel comfortable about asking them for advice? Are they committed to the sector and do they understand fundraising? Will they take time to understand how you operate?*

#### **How did the installation go and what is your experience of ongoing customer care?**

*A welcome change for all the team, moving to Harlequin was hassle-free. We were expecting some problems but there was only one stumble - essentially to do with us grasping that we could link many template letters to the system. The training was really good and had the important personal touch; it was useful to be trained at our desk, on our own data. We regularly attend Harlequin User Group (HUG) events, which add real value. We can suggest product development ideas, see latest releases, meet other members of the HUG community and generally 'talk fundraising'.*

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

- **Increased accuracy and time-saving:** reducing duplication of effort and errors, links in the system to template letters have revolutionised how we deal with thank yous. For ad hoc donations, such as 'walk-ins' to the office, we enter details against a contact record, select a letter into which the data is automatically transferred and then print it straightaway for the supporter. If we have lots of donations, we process these in a batch, linking each donation to a contact. To save time, a function in the software allows us to print thank you letters in one go at the end of day. We also have an

“ Harlequin are like an extension to our department – they always make time and you know who you are dealing with. ”

**Tip:** Quiz suppliers about their fundraising knowledge and ensure they have telephone support.

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annual appeal mailing that used to take weeks and involve the IT department. We are now able to extract the information from the system and have personalised letters ready to print in 20 minutes.

- **Enhanced supporter trust:** having a complete communications record and donation history against every supporter, which is easy to drill into on the screen or lift out into a document, offers reassurance to donors and makes us look slick. For example, when people call to enquire about a cheque, we can bring up their information and relay the date it was cashed. Others want to see a list of their donations over a period of time, which we can quickly extract and issue.
- **Reporting and analysis:** to inform our strategic decision making and planning, management information is easily accessible within the system.
- **Gift Aid confidence:** the system enables us to store who has given permission to claim Gift Aid; in the event of an audit, this would reinforce our confidence. In 2013, Harlequin were on the ball and issued an upgrade encompassing all the new Gift Aid procedures including the Gift Aid Small Donation Scheme.

**Tip:** As early as possible, think of all the template letters, lists and reports that you will want in the system.

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

We co-ordinate all our events on the system including the White Ball, Clothes Throw, Golf Day and Alternative Ascot. First we create a new Event in the database setting up requirements, allocating budgets and assigning tasks to team members. We then create the ticket structure and, using information stored in the database, extract appropriate invitees. We keep track of who is attending, their guests and who has paid. We also despatch the necessary communications before and after the event.

In a similar way, we add runners in the Coniston Challenge and English Half Marathon to an Event, tracking their sponsorship and issuing vests and personalised certificates.

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## Why did you choose Harlequin and why have you continued to use them?

- **Committed to customers:** more than anything, it was instinct - we liked the Harlequin team and believed we could work together. We were 100% convinced that customer care was a real priority and we would be important to them.
- **Ease-of-use:** the screens are well designed and the software is straightforward. We have had returners-to-work with limited IT experience - all have found their way around it, no problem. Harlequin also listen to their customers and this drives how they evolve the software - we have had suggestions incorporated into the system, such as 'expected return date' for collection boxes.

## Have you best practice examples to share about how you use the system?

- **Maximise relationships:** within the system we build multiple relationships between people and organisations. By keeping these connections up to date, we invite groups of 'well-connected' people to the right events, make relevant references to people in applications and understand our Major Donors better.
- **Gifts-in-kind:** by logging gifts-in-kind on the system as 'soft credits', we can readily audit and calculate their value.

- **Meeting packs:** for fundraising meetings, we can extract and print reports, charts and graphs in a concise format.

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

Empathic, responsive and approachable.

**Tip:** Not everyone needs full access to every area of the database; consider what people need to see - this will help improve the way they work.

“ Everything we wanted was in the system and we could readily see the benefits it could bring. ”

## 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](http://www.harlequinsoftware.co.uk) or call us on 01672 541541.