Case Study

CRM and Fundraising
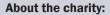
GLOUCESTER CATHEDRAL

Gloucester Cathedral uses Harlequin CRM to unify data and underpin a major fundraising campaign

In 2014, Gloucester Cathedral was embarking on Project Pilgrim. With a phase one target of £6 million, the Cathedral recognised that its aging database needed replacing with a modern CRM system to coordinate campaign activity and consolidate information across the organisation.

About the charity:

The Cathedral Church of St Peter and the Holy and Indivisible Trinity, Gloucester is a medieval jewel with nearly 1000 years of history. It is an extraordinary setting for major services, concerts and art installations, yet also a place for private prayer and reflection.

Visited by thousands each year, many come as tourists or to worship, while others attend the many events taking place.

Project Pilgrim aims to restore and preserve the Cathedral for future generations, create a civic space, engage with local communities and be part of the City's regeneration programme.

Charity information:

www.gloucestercathedral.org.uk
@GlosCathedral

Theo Platt, Head of Development and Communications at Gloucester Cathedral shares the benefits of Harlequin CRM and his plans to get even more from the system.

Why did you need a new system?

The database we were using was very old and difficult, and couldn't handle our data needs. People were drifting back to Excel spreadsheets, leaving us with disparate datasets. We needed a new CRM solution that key staff across the organisation could work on in a unified format. Also, with our biggest ever campaign soon to launch – Project Pilgrim – we recognised that the time had come to invest in the right technology.

What did you want to achieve and how far are you towards this?

The long term goal is for complete consolidation of information throughout the Cathedral. In the 16 months since go live we are 50% there – it is an ongoing mission and Harlequin CRM is set to help us achieve this.

We also wanted a system to manage our fundraising effectively, giving us complete visibility of Project Pilgrim and the multiple sub-campaigns and events that fall under it. Harlequin CRM has certainly helped us to achieve our phase one target of £6M – where we needed to raise £1.5M to access £4.5M in matched funding from the Heritage Lottery Fund.

How and why did you choose Harlequin?

Staff had experience of a range of CRM systems so we researched the market. We also called other cathedrals and Harlequin kept coming up top in relation to both the software itself and the aftercare service. We had a demo and liked it – and were reassured that the ongoing support would be reliable and responsive, which was a particular priority for us.
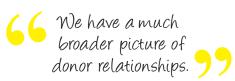
Who uses the system?

Harlequin CRM is deployed across the Development and Communications team and in the Project Pilgrim team. Our events manager and volunteer manager also make use of the Events and Volunteers modules. Our music department even uses the software as a data repository.

How do you use Harlequin CRM?

Campaign management:
Project Pilgrim is set up as an umbrella campaign with a range of sub-campaigns underneath – for example our 'Sponsor a Solar Panel' campaign that has over 100 registrants. We also record all trust approaches as part of the campaign and manage our trust pipeline; this helps us to hit reporting targets and application deadlines. We also produce reports for a complete view of campaign performance.

> We have a much broader picture of donor relationships.

Harlequin Software

Fundraising and communications:
We record all donations on the system and have a complete log of the contact we have with our supporters.

Event management:
The Events module was tremendously helpful for organising our Christmas Market. All stall holders were added and we would track when each had paid.

Volunteer management:
Our 470+ volunteers play a vital part in Project Pilgrim and in Cathedral life in general. All their details are stored in the Volunteers module.
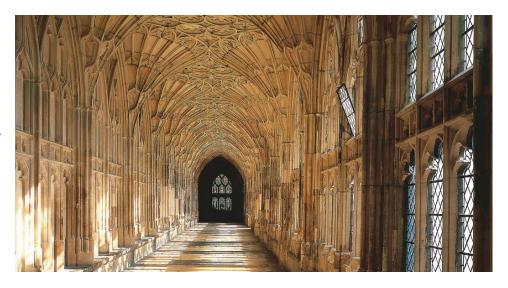
Membership:
Members are logged on the system with renewal information, alerts and standard letters – monthly renewals are issued in batches.

What are the key benefits the system has brought to Gloucester Cathedral?

- *The campaign tools helped us to achieve the phase one target for Project Pilgrim underpinning fundraising from trusts and foundations, major donors, individual giving and sponsorship.*

- *More centralised information and unified ways of working throughout key teams.*

- *Complete financial record of all donations and full log of communications.*

- *Information is more widely accessible rather than being in people's heads!*

- *Much broader picture of donor relationships and engagement.*

- *Big reduction in the amount of hard data we store.*

- *Events module has streamlined our event management.*

- *Easy-to-use; the staff who have moved onto it, love it.*

- *The potential to do even more – the system helps to drive us forward.*

Tip: In the research phase, call up your network and peers – visit them if possible.

> *Harlequin kept coming up top in relation to both the software itself and the aftercare service.*

What are your plans for the future?

Harlequin is full of potential and we are committed to getting the most out of it, which helps to fuel our ongoing progress.

To achieve our goal of one central database, information that currently resides outside of the system will be added: staff, local residents and congregations – our new Receptionist will own this. Our development volunteer is also working through our archives of hard data to ensure that important historical information is made visible to all via the software.

We will also maximise the potential of the Events module and hold more events and larger events. For instance, we aim to grow the Christmas Market and are planning a Medieval Banquet as part of the Henry III 800th anniversary celebrations. A large concert with lightshow is also on the drawing board. Our new Development Officer will also use the system for corporate sponsorship and patron schemes.

Tip: Assign super-users in each team to champion the database and own ongoing data health.

We also want to make even more of the volunteer module, building profiles, tracking preferences, availability, length of service – volunteers are essential to the Cathedral and it is important that we maintain close relationships with them.

To support this, we are investing in training for our new Development Officer and Receptionist.

What advice would you give to a charity implementing a new system?

In the research phase, call up your network and peer group – visit them if possible to see the software in action and ask questions; you will typically get honest responses.

At the implementation phase, have a good plan and stick to it. Ensure you clean your data before it is transferred across into Harlequin CRM and assign super-users in each team to champion the database and own ongoing data health.

What three words best describe Harlequin?

Reliable, user-friendly, full-of-potential.