Greatwood increases income by 66% with the help of Harlequin CRM and co-ordinates its entire operations on the system

Greatwood uses Harlequin CRM for complete charity management. Since rolling out the software in 2010, the charity's income has increased by 66%. High profile fundraising events are managed with the system along with horse welfare.

Background to organisation: Greatwood provides fulfilling futures for former racehorses and teaches children with special educational needs through their interaction in unique programmes of rehabilitation and education in a secure and caring environment. 14 employees and 40 volunteers generated £868.5K in income in 2015.

Region: South West.

Previous data sources: Access and Excel. For finance, Harlequin has enabled a consolidation link to SAGE.

Charity number: 1117322

> " Recording our ongoing dialogue with supporters and their donation history has been transformative. We also keep meticulous records of how re-homed horses are doing and can easily create reports. "

Tip: Look holistically at your requirements and take time to listen to all who will use the system; obtain their support and hear their ideas.

Sharing tips and best practice, Celia Matthes, Charity Administrator at Greatwood describes how they use Harlequin and the benefits it brings.

How has a charity management database increased your efficiency?

Prior to having a centralised system, we had quite a few data silos within the charity. Each team was working independently when in fact there was the potential to utilise our data for fundraising and work more collaboratively. We could see that a new system would help streamline the charity and bring all our information into one accessible source.

Have you any best practice examples of how you use the system?

Events: using the Event Module gives everyone visibility of each activity so nothing is overlooked and supporters feel well-looked-after. For example, our Charity Race Day at Newbury in 2016, with a lunch for 380 guests and auction, raised £137K. We set up the event in the system, assigned tasks, set up the ticket structure, created the budget, tracked income and expenditure and managed sponsor involvement. We sent out invitations to specific datasets, including those who have re-homed a horse or have previously attended . We tracked who replied and paid, names of guest and dietary issues. Finally, thank you letters to all involved were sent out, along with information on further fundraising, including the Greatwood Sunday Lunch.

Friends and sponsors: our Friends contribute at least £5 a month. A Contact is marked with the status of 'Friend' and

added to a Group. Tasks are assigned to ensure they receive updates (newsletters and Open Day invitations) and a reminder for their renewal. By establishing Standing Orders in the system we are able to project income from Friend subscriptions and see when people have not paid. In a similar way, a horse or stable 'Sponsor' receives a personalised certificate and regular correspondence. All donations and communications are recorded against each record so we can nurture their support.

Collection tins: we know where all our tins are and each has a reference number. We know who is the main contact and can set alerts for when to collect the tin. Using a template letter, creating a thank you for the correct amount takes seconds.

How are your horses managed within the system?

Each horse is set up as a Contact including when they arrived, date of birth, height and how they came to us. We log details and reminders for vaccines, vet visits, teeth rasping and re-shoeing. We also add a scanned photo of each horse against their record. On re-homing, a relationship is created with the record of the re-homer so we can keep in regular contact with the new owner and encourage them to fundraise. Within the bounds of data protection, we keep meticulous records of how re-homed horses are doing; we can easily create collated reports of this information.

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How does Harlequin benefit your organisation most?

- **Excellent records for donor development:** recording our ongoing dialogue with supporters and their donation history has been transformative. We are more assertive in communicating at the right level, making the appropriate asks and understanding how supporters are linked to other people on our database.

- **Gift Aid:** we are much more confident at managing our Gift Aid. We can save declarations against Contacts, create R68 schedules, post confirmed amounts, and analyse pending or collected donations.

- **Thank yous:** sending thank you letters is easier and quicker. We have a series of templates on the system that we can automatically populate with specific data. We can choose to print all letters created in the day in one go, so we can stuff and stamp them at the same time.

What advice do you have for others looking for a new charity database?

With process re-engineering, you have to make time to save time – it is worth the effort. Get everyone involved and compile a document that details what the system has to do for each department – now and in the future. Consider ease-of-use as everyone will need access to the system and new starters will have to pick it up quickly.

> **Tip:** If you offer a service or have beneficiaries, consider using the system to manage this part of your organisation; this will help unite your fundraising and service teams.

How will you use the system in the future?

As many charities, we are facing declining support from some fundraising streams and so need to widen our activity and reach more people. Harlequin will be central to this, especially as we still do not use all of the features. We will use the system to manage our grant applications and we will be bolder about promoting our sponsorship and legacy schemes. We are also going to do more profile analysis, initially for major donors. Generally, we will request communication preferences, log more information regarding interests and capture contact data, especially email. This way, the datasets we extract from the system for personalised communications will be more targeted and healthy.

Internally, we are going to use the system more widely and create tailored views to facilitate how people work. For instance, yard staff will only see the horse records and teaching staff will need easy access to the booking module for Horse Power. We would like to administer Horse Power in the system so we can all see what schools, young people and horses are involved in the programme. Setting alerts and assigning tasks will be more widely used, and we will create a suite of management reports for trustee meetings.

How was the installation?

During the installation, no-one was put out and things went very smoothly. We had onsite training with key users, who then showed others how to navigate the system – as the software is user-friendly this was straightforward.

What is your experience of ongoing customer care?

Harlequin offer brilliant aftercare and we get through very quickly to talk to a member of the team.

What three words best describe Harlequin?

Efficient, supportive and time-saving

> " Communication with clients is fantastic and Harlequin's support team are very responsive. "