Nightingale House Hospice unlocks the power of information with Harlequin's CRM and fundraising software

With finely tuned processes and eight years of data, Nightingale House has a richly populated system that is the backbone of its busy fundraising, administration and volunteering teams.

About the charity:

Nightingale House provides specialist palliative care services, free-of-charge, to patients and their families in and around Wrexham, Flintshire, East Denbighshire, Barmouth and the border towns including Oswestry and Whitchurch.

Services include a 12 bed inpatient ward, a 15 patient daycare unit, an outpatient clinic, a specialist lymphedema unit, occupational therapy, complementary therapies, physiotherapy including a hydrotherapy pool and an ambulance service. A range of bereavement support services are offered including a specialist service for children and young adults.

Size of charity:

Income in 2013 was £3,856,436. 76 members of staff are supported by 500 volunteers. Their database contains 35,000 active contacts.

Charity information:

www.nightingalehouse.co.uk
Registered charity number 1035600

Caroline Siddall, Income Generation Director joined Nightingale House in 2007. Her primary objectives were to devise a strategy, introduce professional standards, build a team and upgrade activities; top of her list was the implementation of a professional fundraising system.

What did you want to achieve with the CRM system?

When I started, the fundraising team was not developed and spreadsheets held information about supporters. Main activities were a lottery and a newsletter sent to 15,000 people. We couldn't integrate or segment data, didn't know what donors looked like and had many duplicates. In previous roles, I had used specialist fundraising tools and could see that a charity CRM database would solve these problems and underpin the strategy I had devised for income generation. Our most basic need was to be more professional about donor stewardship.

How did you appoint a charity software supplier?

Initially we created a framework of what we wanted our system to deliver, producing a prioritised three tier list of 'must do', 'nice to have' and 'added bonus' features. For example, searching by name and postcode, and de-dupe tools were 'must do' items. We then evaluated three suppliers including the perceived market leader and a prevalent hospice provider. Harlequin was familiar to me from my last role and I wanted to enable

Tip: Change hearts and minds, and get people onside before the system is rolled out.

the charity to make an informed decision. Suppliers demonstrated their software to our project team including the CEO and representatives from the trustees, finance and fundraising functions.

How do you use Harlequin?

Harlequin is used at every level to analyse, monitor, assess and review all activity. 12 staff use the system across our fundraising, administration and volunteering teams; we now have around 35,000 contacts that are actively manipulated. Fundraisers manage our annual events, such as the Midnight Walk and Light Up A Life, along with individual giving, major donors, corporate supporters, grants, legacies, collection tins, challenge events, merchandise and in-memoriam. Thanking and banking is overseen by our admin team in a slick, organised and timely manner, while our army of volunteers is co-ordinated with the Volunteers module.

Why did you choose Harlequin?

After due diligence checks on Harlequin, we visited a client site. It was evident staff were happy using the system, which instilled confidence. As we were introducing a new working environment, we needed the transition to be smooth to counter internal reluctance - so implementation, training and support were just as important as the software itself. Harlequin stood out for both its software and services – we trusted they could initially deliver and offer the best future relationship.

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What are the key benefits?

- *Ease of reporting and access to information: we can audit information, measure ROI exactly, justify costs and decisions to the Board, and have more confidence in trying new ideas.*

- *Professional donor stewardship with complete communication history. We have a full picture of each donor and can profile supporters to build relationships and maximise income. Donors feel valued and remembered.*

- *Donation history and accurate donation processing to track if gifts are one-off, regular, restricted or gift aided along with the reason for giving.*

- *Complete event management. This module enables us to create and replicate event structures: budget, targets, participation, invitations, resources, reports, communications.*

- *Complete volunteer management. This module helps us to ensure our 500 volunteers feel engaged with our cause and that their time and skills are fully utilised for mutual reward.*

Do you have any examples of best practice to share?

Using data for appropriate asks:
As we've had the system for eight years, we've got some really interesting data. For example, out of our 16,000 valued lottery members, 9,000 had never responded to wider asks so we reduced their hard newsletter mailings from four to one a year, sent with a tailored lottery thank you. We then sent a mailing with raffle tickets and tracked a 3,000 response rate.

Processes that increase income:
Using the Collection Tin module, we now raise £50K compared to £12K p.a. simply by using a honed process. We track tin locations and who placed them, analyse income, and plan volunteer rounds. We service sites every four to six weeks

depending on the data – ensuring tins are clean with new labels and kept half full so they are not 'shelved'.

Reaching new audiences:
The system revealed that our Rainbow Run attracted 800 fresh participants from a new demographic of 20-40 year olds. This prompted us to review our marketing to understand how we reached this audience and how to build on this.

Photos and permissions:
We attach fundraising photos against contacts to save trawling the network for specific images. The same goes for permission forms, mainly for children, so that images are used with confidence.

What are your plans for the future?

Harlequin is much more than a 'big adding up machine' and we constantly push its boundaries. This year we celebrate our 20th Anniversary and plan to maximise the success of our annual events based on the information we hold in the system. Using complex data extraction reports that prioritise on specific attributes we are writing to all participants from over the years. For example, for the Midnight Walk, walkers will receive a tailored letter, volunteers a revised version and if they were both, another version again, so that each message is highly personalised to

encourage the event to be the 'Biggest Ever in our 20th Year'. A similar process will happen for all our challenge events as well as a mailing to schools.

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

Look at the market and visit a client site if you can before investing. Take key people with you, see the software in action and talk to a main admin user. Include your CEO and Trustees who will expect a strong justification of the cost in your strategic plan. Change hearts and minds, and get people onside before the system is rolled out.

What is your experience of customer service at Harlequin?

Back in 2008, when we handed over our hotchpotch of data Harlequin did a fantastic job in cleaning it for the data migration. Our go-live was painless as planned.

Customers are treated as individuals. The team goes the extra mile to support us - including out of hours help at critical times. Users have a key voice in developing the software and I am pleased to be a central part of the user group that evolves the system for hospices.

What three words best describe Harlequin?

Efficient, friendly, supportive.

> **Harlequin is used at every level to analyse, monitor and review all the activity we undertake.**

> **Tip:** Produce a three tier list of priorities of 'must do', 'nice to have' and 'added bonus' features.

> **Harlequin stood out for both its software and services.**

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