Addenbrooke’s Charitable Trust runs seamless operation with Harlequin’s CRM and fundraising software

Over the last three years Addenbrooke’s Charitable Trust has scrutinised how it operates and has continuously strived to make the most of its data and information. It has achieved a culture for making its charity software work for everyone.

Background to charity:

Addenbrooke’s Charitable Trust (ACT) is dedicated to supporting innovation in research and patient care across Cambridge University Hospitals NHS Foundation Trust, which runs Addenbrooke’s and the Rosie hospitals - considered to be among the world’s best academic healthcare organisations.

ACT raises funds for cutting edge technology, additional specialist staff, environmental enhancements and extra comforts for patients. It also provides seed funding for early stage research projects, which can often lever more ambitious research funding opportunities, and as such can be an essential component in identifying advances in treatment and global cures.

Size of charity:

Income in 2013 was £8,430,000. Twenty eight members of charity staff are supported by a growing team of volunteers and community ambassadors.

Charity information:

www.act4addenbrookes.org.uk
Registered charity number 1048868

Mark Olivier, Systems and Information Manager joined ACT in 2011. One of his initial goals was to reinvigorate how the charity used its Harlequin CRM database. Mark describes how he has achieved system integration, streamlined working practices and created a proactive approach to data.

What did you want to achieve with the CRM system?

When I joined ACT, Harlequin was already being used, however, the charity was not as yet making the most of all the available features in the CRM system and some fundraisers were still working in isolation on their own spreadsheets, with their own processes.

I needed to take up the baton from my predecessor to create centralised processes that supported consistent, efficient ways of working. Beyond this, my overall aim was to encourage all users to have the confidence to think beyond spreadsheets and continuously question how they use and share information.

How do you use your software?

We use the software across the board in our three offices. All donations are recorded each day and communications are tracked including emails.

The Addenbrooke’s Abroad team also log into the system to work on their own records.

On an everyday level our Marketing and Communications team manage our major direct marketing appeals, the Supporter Relations team oversee administration and thank yous, and Community Fundraisers co-ordinate their busy and varied activities.

On a strategic level, we run queries on the data, and create standard and bespoke reports – this informs decision-making and reveals performance insights. Along with the standard tools for campaign and donation management, contact management, Gift Aid and grants, we have designed templates for the Major Donor Team and a workflow for legacy management.

What is your experience of customer service at Harlequin?

Harlequin demonstrates a user-focused approach in both its software and services. They are prepared to adapt their software and listen to users’ suggestions. They thoroughly understand the hospital charity market and are driven to help their customers make the most of their software.
What are the biggest benefits that Harlequin has brought to ACT?

- A centralised system with streamlined processes for fundraising.
- Confidence to move away from spreadsheets and isolated ways of working.
- Up-to-date communications and complete history of stewardship.
- Increased confidence with data protection and disaster recovery with a secure environment where key documents are linked to records and data is processed appropriately.
- Buy-in from the whole team with a proactive culture of making the most of information.
- Easy-access to accurate reports and management information.

Do you have any examples of best practice to share?

User groups:
We hold regular internal user group meetings with representatives from all teams, including fundraising and supporter relations. We look at new features in the software, and encourage questions and requests for enhancements.

Daily report:
We create a daily income report from our fundraising system. This details funds from each team and department, enabling them to compare actual to budget on a continual basis.

If there are any anomalies, a discussion can be had at the end of the day before the information is sent across to finance.

Legacy and major donor templates:
The template tool is a blank canvas onto which you can capture any information. As a team we are always considering what processes can be replicated and automated on the CRM system.

For example, we have a workflow for legacy management. This securely holds scanned documents, such as wills, against records and logs communications with solicitors and relevant parties. We also use templates for our major givers; a summary profile is printed prior to meetings with donors.

What are your plans for the future?
We have a range of donor recognition options, including donor walls and plaques. At present, information relating to ‘who, when and where’ is kept in a separate spreadsheet. We plan to use the new template tool within Harlequin to underpin this specific process to extract lists and reports, and communicate with donors.

What advice would you give to a charity implementing a new system?
Ensure that you plan the process properly and talk to all potential users of the system. Look at the various systems and spreadsheets that are currently being used across teams and consider how you will be able to incorporate these into your new software.

Fully engage with your colleagues about how they operate; it is best to ensure staff feel involved from the start when it comes to moving their working-world into a new environment.

High levels of user confidence will create a more proactive experience, helping them to make the most of features and actively consider what the system can do for them in the future.

What three words best describe Harlequin?
Adaptable, user-friendly and perceptive.

Harlequin demonstrates a user-focused approach in both its software and services.

Tip: Hold regular internal user group meetings with representatives from all your teams. Look at new features, encourage questions and welcome enhancement requests.

We have up-to-date communications and complete history of stewardship.

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