

Over and Above manages its third major appeal with Harlequin software along with 90 ward and department funds

Ian Roome, Head of Fundraising and Volunteering at Over and Above started using Harlequin CRM in 2011. He shares how the charity is benefiting from the system and why he feels Harlequin is "by far the outstanding database company" on the market.

About the charity:

Over and Above is the registered working name of the Northern Devon Healthcare NHS Trust Charitable Fund.

It fundraises Over and Above what the NHS is able to provide to make a real difference to patients, their families and the amazing staff who treat them.

Money is raised, held and accounted for independently from the Trust's NHS funds and is spent exclusively for charitable purposes to improve the health and wellbeing of the NHS patients of the Trust's hospitals and community services.

Many supporters request they would like their donations and legacies spent for the benefit of patients in a particular ward or department, or on a particular type of medical service. The charity honours this by maintaining about 90 separate funds.

Donations go towards improving the hospital environment, buying state-of-the-art medical equipment and helping the hospital to go way beyond the NHS standard.

Charity information:

www.overandabove.org.uk
@overandaboveNHS
Registered charity no. 105146

What were your business drivers for investing in Harlequin CRM?

In 2011, we launched a major appeal to raise £2.2M for our new chemotherapy and day treatment unit. We did not have a CRM and fundraising system so it was clear - to maximise the success of our appeal - the time had come to look at the charity database market.

What process did you follow in selecting a new system?

We looked at other suppliers and asked for recommendations.

Why did you choose Harlequin?

We liked Harlequin as it is a family business and demonstrates a core set of values in how it operates. They care about their customers and are dedicated to what they do. Also, the software came highly recommended by other hospital charities; it is user-friendly with good functionality and integrates with the Harlequin Charitable Accounting system.

Tip: Select a system that is the best fit for your size of organisation, which will therefore be the best value for money.



We did look at the other major systems but the costs were prohibitive. I think it is unquestionable that Harlequin CRM is the best value for money and best fit for any SME charity.

How do you use the software?

Our Harlequin CRM system has a live link to Harlequin Charitable Accounting, which we also rolled out in 2011. We are able to manage with absolute confidence our 90 separate department and ward funds. We also process Gift Aid claims more easily.

The core CRM functionality enables us to nurture donor relationships and log all donation history and communications. We can also manage our grant applications and legacies. With the Promotional Items tool we trace and track collection tins and buckets.

For our Appeals, we use the in-built Campaigns functionality to keep track of income streams against our overall target. We can report on progress and analyse data.

“ Our Harlequin system is important in the strong governance of the charity. ”

Case Study

CRM, Fundraising &
Charitable Accounting

Over and above
Your Hospital Charity
supporting Northern Devon Healthcare NHS Trust

We also have the Events module, which helps with the organisation and promotion of our Scrumptious Croyde Trail, a 10 mile event that attracts 300 participants. We also have our annual Big Purple Day.

What are the key benefits?

Central and secure data: Harlequin does what it says on the tin. We have one easy-to-use system that contains all our contacts and communications. Data security is crucial, so having information in a central system ensures we can implement robust procedures. This builds trust with supporters.

More cohesive team: we all work in a unified way on the same system and are committed to its upkeep. We can set alerts and allocate tasks. Also, the fundraising and finance teams can support each other more effectively.

Enhanced governance: we can provide clear and accurate information and report on all financial interactions. When it comes to being audited, we are fully prepared.

Insight: the reporting tools within Harlequin enable us to have visibility of ROI and the progression of Appeals. We can understand our income with more clarity and segment data.

Closer donor relationships: the system underpins good ways of working; supporters feel more valued, thanked and engaged. We can send more considered mailings to specific data lists (eg based on preferences, interests, location and giving history).

Tip: Ensure to make the most of the reporting tools within the system for extracting data and reporting on information.



Have you had any challenges?

Integration with the range of third party application interfaces we required was a task we addressed collaboratively early in the project.

What is your view of customer service at Harlequin?

Harlequin is by far the outstanding database company in the respect that it gives you the personal touch instead of a corporate organisation. Staff are very friendly and deal with issues quickly.

What are your plans for the future in relation to Harlequin?

We continuously grow our team's knowledge of the system to use it to its full potential. For example, we will be using the GDPR consent tool that has been rolled out to all Harlequin CRM customers.

As we progress with our North Devon Cancer and Wellbeing Centre Appeal, the system will be our all-encompassing Appeal hub.

“ Harlequin is by far the outstanding database company. It gives you the personal touch instead of a corporate organisation. ”

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

Select software that is the best fit for your size of organisation and is therefore good value for money. Invest in a system that you can financially justify, now and in the future - one that will also evolve in line with changing charity regulations.

You won't go far wrong with Harlequin.

What three words best describe Harlequin?

Flexible, personable, approachable.

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