

## Harlequin Software helps UHCW Charity triple income in three years and integrate fundraising & finance

When Adela Shephard took over as the Head of the University Hospitals Coventry and Warwickshire Charity, one of her first priorities was to select a reliable and user-friendly CRM & fundraising database. Three years later the income for the charity has tripled and it has also implemented the charitable accounting system from Harlequin to achieve a close working relationship between departments.



Volunteers (from left) Robert, June and David with Adela Shephard

**Background to charity:** UHCW Charity is the charity for University Hospital, Coventry and The Hospital of St Cross, Rugby, which are part of the University Hospitals Coventry and Warwickshire NHS Trust.

Whether it's for a serious medical condition, such as cancer, a minor accident or the birth of a child, UHCW Charity helps patients and their families to have the best care possible.

**Region:** West Midlands

**Previous data sources:** Excel and accounts database

**Size of contact database:** c6000



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Clifford Bridge Road  
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www.uhcwcharity.org  
Tel: 02476 966913  
Registered charity number: 1058516

Tom Ellis, Managing Director at Harlequin, caught up with Adela and her team to discuss how they use the system and the impact that Harlequin has had on their fundraising.

### When did you decide that you needed a new database?

*As the first ever manager for the charity, I had three key priorities for my first 100 days in post: a website, information leaflets and reliable CRM and fundraising software.*

*Having worked with databases in previous roles, I knew the importance of keeping accurate records of contacts and communications in order to build successful donor relationships.*

### What did you use before Harlequin?

*I inherited around 5,000 contacts stored on the accounting system and various spreadsheets, which when we cleaned them up turned out to be over 1,000 actual contacts.*

### What process did you follow?

*I looked into various systems and I discovered that many other NHS charities across the country were using Harlequin so I contacted several of them. On their recommendation I asked the Harlequin team to present to myself and the Director of Finance, who had previously been responsible for the charity. I needed the finance team to understand the benefits of a CRM and fundraising database, as opposed to an accounting database. The benefits of the Harlequin system and its flexibility soon converted the Finance Director.*

### Why did you choose Harlequin?

*It was evident from my meetings with Harlequin that the team were continually reviewing and updating the system after listening to users' views. That is really important to me as fundraising is constantly changing.*

*I also looked at the ongoing costs of the system compared to other companies, with most charging for new upgrades to the database, whereas with Harlequin this is all part of their service with no extra fee.*

### What are the biggest benefits?

- **Increased income:** when I started, the charity raised £360,000 per year - three years later we raise over £1,000,000. The system has definitely enabled us to grow both our supporter base and income from campaigns, as well as to increase giving levels and nurture closer relationships with our supporters.

“Harlequin is informed and passionate about fundraising and the charity sector.”

- **Centralised information:** having all our data in one place helps us on an everyday level to work smarter and adhere to best practice processes; however, the unification of information also allows us to run queries and extract reports to inform fundraising planning and help us to see what is working and what is being achieved at a more strategic level.

# Case Study

UHCW Charity  
CRM, Fundraising & Accounting



**Tip: take the time to clean up your contact data before you move to a new system - Harlequin can help with this during the conversion process.**

## How does your team use Harlequin?

- **Donations:** we record all donors and supporters on our system, including the various Gifts in Kind that we receive. Harlequin enables us to monitor general income and donations to the various hospital departments so that we can provide accurate reports to the Trust. We also reconcile all income with accounts at the end of the month.

We send a thank you letter directly from the system to every donor who sends a cheque or provides their details and we also ask them to Gift Aid their donation.

- **Communications:** we are a small team so we keep each other up to date with all the communications that we have with our supporters by recording all emails and contact. This means that anyone in the team can answer a query from a supporter as the records are accurate and Harlequin makes the process simple.
- **Campaigns and targeting:** when we started we knew little about our donors and we had no real relationship with them. Using the status codes on the system we have re-engaged with supporters and we have been able to send them relevant communications and to make asks at appropriate levels. This has enabled us to grow income from campaigns and regular givers.

Proceeds from our Christmas Prize Draw have also massively increased each year as we have been able to go back to those that supported it in previous years.

“The system has enabled us to grow both our supporter base and income from campaigns.”



## What are your plans for the future?

Members of the finance team have undertaken Harlequin fundraising training to understand how the system benefits fundraising, and we are currently moving to the Harlequin charitable accounting system.

This will ensure the fundraising and finance teams work fluidly together and further improve our operational efficiency and the service we deliver to supporters.

## What advice do you have for others looking for a new system?

Getting the right charity management software is important, but the relationship that you have with their support team is crucial; they must have a rounded understanding of your needs.

You should also look at how they plan to develop the system going forward and how they are going to support you in the future.

Also be open-minded when looking at systems - you may think that you only need “A” but you realise that you need “B”.

As with our finance department, you soon realise the benefits to the whole organisation of having integrated processes.

## What is your experience of customer care from Harlequin?

Everyone in the team is helpful and takes ownership of any problems: you raise a query, you are sent a solution and it is fixed - simple.

People at Harlequin are also well informed and passionate about fundraising and charitable accounting - and it is reassuring to know they have worked with a significant number of hospital charities for many years.

## To you, what five words best describe Harlequin?

Responsive, efficient, helpful, reliable and immediate.

**Tip: evaluate the benefits of your fundraising and finance teams working on an integrated and centralised system from Harlequin.**

## Find out more about Harlequin Software

To book a demonstration at your office please call us on 01672 541541 or visit [www.harlequinsoftware.co.uk](http://www.harlequinsoftware.co.uk)