



RMHC fundraisers and staff from the Ronald McDonald Houses all connect with Harlequin

Faced with a redundant system, Ronald McDonald House Charities (RMHC) embarked on a project to re-invent their approach to data. With their Harlequin database they now have a joined-up network of Ronald McDonald Houses, offices and contacts that has enhanced the family experience when booking in to the Houses and boosted fundraising.

Background to charity: Ronald McDonald House Charities is an independent charity which aims to provide free 'home away from home' accommodation for families with sick children receiving treatment at hospitals across the UK, enabling them to stay close to their child and maintain a degree of normal family life.

The charity has achieved a lot in the last 25 years. 14 Ronald McDonald Houses have been built and in 2013 they helped over 7,000 families stay close to their children in hospital. However, there is still a great deal to do. Many families still have to sleep on camp beds or in their cars in order to be close to their children, and RMHC is determined to help as many of these families as possible.

The charity's biggest source of income comes from the collection boxes in McDonald's restaurants, through which customers give millions of pounds each year. In addition, McDonald's employees and suppliers support the charity by organising fundraising events and donating their personal time. The company and its franchisees also make generous annual donations from their profits. We also have tremendous support from families who have stayed with us.

16 users went live on the system in August 2008; six years later RMHC has more than 60 users.

Size of database: 36,000 contacts and growing

Region: UK wide

Previous system: other charity system, spreadsheets, paper

Who uses the system: staff who work in the Houses, and the fundraising, management and administration teams.

Along with tips and best practice insights, Julia Bevan, Database Administrator at RMHC, describes why the organisation needed new software, how they use Harlequin and the biggest benefits they are experiencing.

Why did you need a new system?

We had an obsolete database and 18 years worth of information in various places. Unwieldy and difficult to use, no-one understood the software and a paper based process and spreadsheets had evolved. After trying to resurrect the system, we were forced to look elsewhere as the supplier was unable to develop the software to our changing needs or offer tailored training.

What did you want to achieve?

The vision was of an easy to use, flexible database that everyone would use every day: a central pool of data, holding all our contacts and used as an essential tool for a variety of purposes by House teams and fundraisers. It was imperative we found a partner who would adapt to us with easy-to-use software that was not extortionately expensive.

What process did you follow when looking for a new supplier?

Aware of the main players in the sector, we invited three companies to our head office to 'pitch' their solutions.

Tip: Create a group of key personnel from each team to help drive the project forward. Get buy-in from the top; with the CEO onboard others will readily follow.



Julia Bevan, Database Administrator, RMHC

Our head of fundraising involved relevant colleagues to ensure all requirements were covered and compiled a report for our Trustees covering essential features, value for money and usability.

Why did you choose Harlequin?

We had confidence that the Harlequin software and their friendly approach best suited RMHC. Unlike the other suppliers we met, they listened to us and were able to offer (at a realistic price) an integrated system for our head office, Houses and fundraising team. As part of this, they were happy to do specific development work. I believe Harlequin offers an excellent solution for forward thinking not-for-profit organisations.

What advice would you give another organisation looking for a new system?

Be realistic about your size and what you want the database to do now and in the future. Some systems have been designed with the Top 50 charities in mind and may leave organisations with smaller workforces with a sprawling, expensive package and superfluous functionality.

Choose an established company with a strong user group and software that will progress and not hold you back – this way you won't outgrow your system and have to start again.

How do you use your Harlequin?

For complete contact management Harlequin spans our entire organisation: families who stay in our Houses, supporters/prospects, McDonald's restaurants, franchisees and suppliers are all entered. Each House has a tailored, secure view of the database showing their relevant contacts. Head office staff and managers have a complete view of the system to oversee communications, extract strategic reports, produce Gift Aid claims, analyse data and manage national campaigns.

- **Our home away from home accommodation:** as families arrive, staff record details and allocate rooms. We also track when families move to other Houses and hospitals. All communications are logged and each House despatches a quarterly newsletter and manages their local events on the system, such as dinners for supporters in the area.
- **Fundraising:** all donations are logged on the system. Each type of fundraising is managed by relevant features and modules: events (eg golf days and challenges), major donors, community and corporate, grants and legacies. Promotional items such as collection tins and banners are managed on the system.
- **Restaurants:** across the UK, we record and report on the income from collection boxes; in addition to producing certificates, this helps create healthy competition!

What are the biggest benefits?

- A more joined up service for families.
- More robust funding applications, reinforced by figures from the system.
- Integrated data, streamlined processes and a more unified organisation.
- Strategic insights help with management planning.
- Improved donor development with more accurate profiles.
- Gift Aid is managed efficiently.

For example, it is easy to run annual financial analysis reports and build up a donor analysis spreadsheet showing totals (direct and/or soft credits) by year, and



Some of the Ronald McDonald House Charities team

using the groups and indicators produce analysis and comparisons by different donor types. I also produce a monthly dashboard summarising different income streams and comparing this year/last year figures.

Another example is the ability to extract the postcodes of – say – families who've stayed in our Houses and use mapping software to answer typical fundraisers' questions such as "how many families from Greater Manchester have stayed in our Houses this year?"

What are your challenges?

Having 60 users with different levels of data entry expertise presents a challenge in relation to the consistency of data; validation tools within Harlequin help with this. We have also produced a step-by-step user guide to assist people in creating records and updating the system according to our own processes.

What is customer service like at Harlequin?

The support is excellent; the team are highly responsive and friendly. Harlequin has a real customer care ethos, which is refreshing in the software world.

Tip: Include the use of the database in all job descriptions. Ensure new joiners are given consistent and timely training, backed up by documentation.

Do you have any examples of best practice to share?

From the outset, we created a group of key people from each team to keep the project moving forward. To encourage widespread ownership, a commitment to use the database is included in all relevant job descriptions and endorsed by senior management. When new people join, we train them quickly, using standard training exercises which are tailored to their role (and they can't access the system until they've been trained). We've produced a user guide which has our own screen shots and step-by-step details using our vocabulary – this underpins common ways of working.

What are your plans for the future?

Adding new Houses and managing mergers is an ongoing activity. Data cleansing is on its way – our family and individual data is in good shape but corporates need some attention. I'm keen to develop more superusers to provide local support in the Houses.

What three words best describe Harlequin?

Responsive, reliable and adaptable.

“ Harlequin offers an excellent solution for forward thinking not-for-profit organisations. ”