



Winston's Wish saves precious time and money with Donor Strategy

Winston's Wish is the leading childhood bereavement charity in the UK. It is a disturbing statistic that every 22 minutes a child in Britain is bereaved of a parent.



Winston's Wish responds by providing practical support and guidance to around 30,000 families and professionals every year.

Now in its eighteenth year, the charity offers a range of services that include national programmes such as its national Helpline and expertly written publications. With a head office based in Cheltenham, Gloucestershire and a regional office in Pulborough, West Sussex, Winston's Wish also provides training for teachers, social workers, police liaison officers and healthcare workers among others.

Business challenge

From a small start, originally within the Gloucestershire NHS, the charity grew rapidly with an accompanying expansion in the scope of its work. Sally McIlwraith, Head of Business Support at Winston's Wish explains how this affected the way that staff captured and shared information, "Until then, we'd been able to manage the information on the families we help using Microsoft Office tools such as Access and Excel. However, this leap in size and scale meant more information being collated by more people

and a greater need to be able to share and pool our knowledge in a co-ordinated manner."

Winston's Wish commissioned a bespoke database, but unfortunately, as Sally recalls, "It never quite did what we wanted. It was very difficult to extract management information from it, even on the fundamentals, such as how many families had been referred that month and the ages of the children. We must have spent many thousands of pounds trying to align it to our needs."

Despite natural reluctance to change the system underpinning its day-to-day work, the point was reached where Winston's Wish decided to search the market for alternative charity software. It needed a solution which could support both service provision and fundraising, with the ability to customise the functionality to match the way it works.

Solution deployed

The field narrowed to a shortlist and Donor Strategy from Advanced NFP emerged as the front-runner. Winston's Wish Database/IT Manager Jon Norman says, "We particularly liked its ability to map family relationships and also the publications module. We realised that the latter

Client >

Winstons Wish

Sector >

Not For Profit
Charity

Project >

Improving the charities
database and strategy

Winston's Wish saves precious time and money

would enable us to keep track of who orders training resources and other publications and help us to build our database of contacts as well as helping with stock control and forecasting." Donor Strategy was implemented in June 2009. A twenty-user system was installed, and over thirty staff and volunteers were trained in its use.

Benefits achieved

Winston's Wish now has a single powerful database through which to record its contact with bereaved families and professionals. Jon says, "Donor Strategy is the 'workhorse' that reliably supports our day-to-day work. It is used by staff and authorised volunteers in all departments, including family services, fundraising and business support. Everyone finds it easy to pick up."

Managing sensitive relationships

Bearing in mind the sensitivity of the personal information which Winston's Wish acquires, it is vital that staff have full confidence in its currency and accuracy and that family relationships, which often change in the aftermath of a death, are correctly logged and tracked.

Sally points out, "Behind the immediate bereavement may be a complex family tree and other bereavements. To provide a truly effective, helpful service, we need to understand the context to a particular bereavement. Our staff must be able to access a rounded picture of the bereaved family, and our relationship with them and with their support network. We achieve this through Donor Strategy."

Assistance on the fundraising front was also a priority for the new system. Donor Strategy helps Winston's Wish to record and manage the funding it receives from a range of sources, including trusts, health authorities, public donations and community fundraisers, corporates and major donors.

The nature of the charity's work means that it attracts personal donations in the form of tribute funds and legacies. Having a system which also records relationships is of enormous help here. The charity can be sensitive in approaching a donor and avoid particularly stressful times, such as the anniversary of a death.

Free to focus on families

Sally remembers, "Whenever we did a mailing with the old system, our family services team used to have to check and check again to ensure we'd got our facts straight. Now we have all the information recorded and maintained centrally. Not only does Donor Strategy improve the quality of the information we extract, as a unified source of data, it also frees our front-line teams from administration, so they can focus on the work that matters most - helping bereaved families."

A trusted source of management information

Donor Strategy assists Winston's Wish with charity management by providing critical management information on its activities, helping managers understand what works and what doesn't, and plan resources efficiently for the future. So, for example, regular management reports can be produced to measure key performance indicators such as the number of new referrals and their sources, cases closed, and outcomes of assessments.

Like most charities, Winston's Wish has to adapt to a challenging funding climate. Sally comments, "We know a tough year lies ahead, with funding becoming scarcer. The strategic actions we are taking include recently recruiting managers for individual giving and marketing communications. They are set to be heavy users of Donor Strategy and will draw on some of its features more extensively."

Maximising every revenue stream

Winston's Wish already records donations on the database and uses it to send out thank-you letters. Gift Aid is an important revenue stream, and it can be recorded on Donor Strategy by ticking a box and adding the date.

The finance team can then run reports on the additional income that can be claimed. In future, it will be used to save more time on handling direct debits and standing orders.

Another source of funding is the Winston's Wish online shop, where publications, resources and merchandise can be purchased. This is also managed through Donor Strategy. Details from the order lines can be easily exported to the charity's accounting system.

Donor Strategy also records communications around the many community fundraising events it holds, such as sponsored abseils or the

"We particularly liked its ability to map family relationships and also the publications module. We realised that the latter would enable us to keep track of who orders training resources and other publications and help us to build our database of contacts as well as helping with stock control and forecasting."

Jon Norman
Winston's Wish
Database/ IT Manager

Winston's Wish saves precious time and money



"Not only does Donor Strategy improve the quality of the information we extract, as a unified source of data, it also frees our front-line teams from administration. They can focus on the work that matters most - helping bereaved families."

Winston's Wish

annual Sunrise Walks. It can target purchasers of publications and resources to explore their interest in being more closely involved with the charity, with a view to inviting them to participate in fund-raising activities.

Continued support from Advanced NFP

Throughout, Advanced NFP is on hand to help Winston's Wish gain optimum use out of the system. Jon notes, "It's good to know that the helpdesk team are always available to give us expert advice and support." He has also found attending the Donor Strategy user group an opportunity to understand how Donor Strategy is being developed and to share ideas and experience with organisations in the same sector.

The Winston's Wish helpline is 08452 03 04 05. For more information visit www.winstonswish.org.uk

More information

w oneadvanced.com
t +44(0) 8451 605 555
e hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy.