



ARC Cancer Centres Customer Story



So you need to develop your donor database & fundraising operations, but not sure where to start?

Project Background

The small but mighty fundraising team at ARC Cancer Centres has successfully brought their fundraising income from strength to strength in recent years, largely through community in-person and virtual events. As they entered a new stage in their fundraising programme and prepared to invest in new income streams for the organisation, optimising their fundraising data became a high priority. It was time to take a step back to ensure they had airtight fundraising procedures and a CRM platform that was fit for purpose. Enter the HX Consultancy!

Scoping and Project Plan

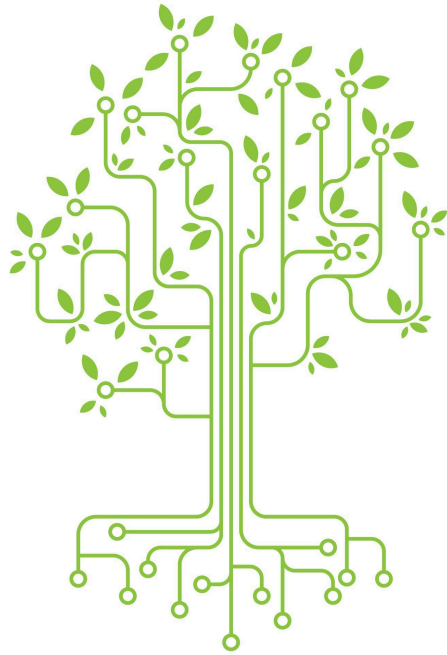
The first step was an efficient but comprehensive audit of ARC's existing policies, donation procedures, internal audits and data resourcing. This was followed up by a review of their payment landscape and existing Salesforce instance, in collaboration with implementation partners Enclude. While Salesforce had been used by ARC's services team, from first glance it was clear that a robust set of new fields were required across donor, donation and campaign records. The project also presented an opportunity to double down on GDPR for fundraising, ensuring robust consent capture and compliant data classification.

"Jane made it seem so easy, yet we know a lot of work went on behind the scenes constantly, to ensure this database was delivered on time. I cannot recommend Jane highly enough and the icing on the cake - she's really good fun to work with too and really took the time to get involved and to get to know us"
Stephanie Nolan, Head of Fundraising & Communications, ARC Cancer Centres

Laying the Data Foundations

With our support to develop the right data model, ARC established sound infrastructure to capture future donors effectively, rather than feeding them into a leaky bucket! And for the first time, donor and donation details sitting across disparate payment and fundraising platforms can be imported to a central donor database.

What's more, effectively mapping key fundraising fields back to finance codes has removed much of the pain of monthly reconciliations and ensured funding allocations are aligned across the CRM and finance systems.



Supporter Classification

The opportunity to classify donors and services users holistically was a brave step, embraced fully by the whole ARC organisation. Through cross-functional workshops and collaboration with Enclude, we devised a classification framework that gave high level visibility of stakeholder types across teams, while restricting access to any sensitive data. As with many health-based charities, there is a huge overlap across their fundraising and client base. Clear visibility and management of this will be invaluable to ARC in sensitively tailoring their communications going forward.

Fundraising Operations

Like most charities, ARC has passionate but limited resources to process their donations. But meanwhile, fundraising and payment platforms continue to proliferate with teams drowning in .csv files! Against this backdrop, careful attention was given to simplifying data import processes. Integrations were explored and prioritised, but investing in full automation of all platforms is usually beyond reach. Where volume was lower, pragmatic options were put in place to optimise and streamline the import process, with connections made to relevant experts where necessary. This means more time is now available to nurture those critical donor relationships and to mine the data more fully to empower this.

Policy & Procedure Rollout

ARC is committed to ensuring that all valuable donations are handled with appropriate levels of compliance, security and care. Existing procedures and policy documents were carefully reviewed, with fresh ones optimised or created from scratch where necessary. Particular focus was given to cash handling, where another cross-functional workshop teased out all processes, step by step. Detailed recommendations were implemented to mitigate risk, protecting employees and volunteers as well as the donor trust. A second workshop was held to rollout all fresh procedures, ensuring that the relevant teams had the knowledge and understanding to execute.

The Sky's The Limit!

With the right platform, processes and procedures in place, ARC are confidently ramping up activities across community & corporate fundraising and individual giving.

"The HX Consultancy fronted by the incredible Jane Trenaman delivered on a 6 month project for ARC Cancer Support Centres - a donation procedures and compliant centralised donor database on Salesforce no less! We are confident that with Jane's expertise and hard work, alongside partners ENCLUDE, we have no limits now in what we can achieve. "

Stephanie Nolan, Head of Fundraising & Communications, ARC Cancer Centres



Stephanie Nolan, Head of Fundraising & Communications, ARC Cancer Centres
Jane Trenaman, Managing Director, The HX Consultancy