

CASE STUDY

Improved Fundraising and Donor Experience Via Cloud-Based Solution

CLIENT:
Health Centre Foundation

PROJECT:
Non-Profit Fundraising Platform Selection

CHALLENGE

- Fundraising and relationship management software had not been updated for five years
- Hosting service not sustainable in the long-term
- Technical support issues with the 3rd party online donations platform recently impacted a major fundraising event

SOLUTION

- **Requirements gathering** – Met with key stakeholders to collect current state and future state requirements
- **Search the market** – Compared platforms that met the selection criteria (including current platform)
- **Vendor due diligence** - Vendor discussions and demo
- **Platform selection** – Selection of relationship management platform and ancillary e-marketing, online donation, and payment processing functionality
- **Recommendation** - Recommended upgrading to cloud version of Raiser's Edge NXT and consolidating 3rd party e-marketing, online donation and payment processing functionality onto a single platform

RESULTS

- Software will always be kept up to date with the latest features and security patches
- No need for on-premise hardware or reliance on hosting services
- Simplified technical support services and vendor management
- Streamlined core processes and eliminated re-keying of data
- Unlocked new innovative features and improved the donor user experience

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ABOUT

The Health Centre Foundation is dedicated to enhancing the Heath Centre's ability to provide quality care and home-like surroundings through funding for new equipment, special services, updated facilities, innovation programs, research and education. The Foundation needed to upgrade or replace its fundraising and relationship management solution (On-Premise Raiser's Edge) while considering an integrated solution that includes e-marketing, online donations and payment processing.

INTEGRATED SOLUTION

A Resolute Technology Solution's Senior Consultant led Foundation stakeholders through a collaborative approach to select the optimal solution. Analysis started with the baseline business processes and systems, including data, interfaces, support services and current operating costs. Next, the goals, functional needs and quality attributes to be achieved were collected, documented and prioritized. A total of seven solution options were initially considered, followed by more in-depth investigation of the top three.

Evaluation criteria included functional fit, technical fit, vendor capabilities and cost. The recommended solution involved upgrading the relationship management system to the vendor's new Software-as-a-Service (SaaS) offering and replacing 3rd party e-marketing, online donations, and payment processing.

REDUCED RISK, STREAMLINED PROCESSES, AND NEW OPPORTUNITIES

Having successfully implemented the new solution, the Foundation has realized substantial benefits. Their cloud-based fundraising and relationship management solution will always be kept up to date with the latest features and security patches. By consolidating functionality onto a single platform, accurate information now flows seamlessly, eliminating highly manual processes and re-keying of data. With access to new innovative features, improved donor user experience and better data, the Foundation is well-positioned to continue fulfilling its mission long term.