



MAKING THE SWITCH TO RAISER'S EDGE NXT™

# Supporting the growing demands and strategic direction of Bolton Clarke



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—Alex Cross  
Head of Fundraising

In 2015, RSL Care and Royal District Nursing Service (RDNS) came together to become Bolton Clarke. As one of Australia's most experienced not-for-profit organisations they know putting people first means doing the hard things – and the small things. Bolton Clarke offers a continuum of care services to residents and clients that match their needs and their health and lifestyle journey. Its services connect customers to solutions that promote healthier, more productive and involved lives.

Today, Bolton Clarke employs more than 6,500 staff who make over 4 million client visits each year in Australia, New Zealand and Asia and provides a wide range of general and specialist care services, 24 hours a day, every day of the year. This includes at home support, retirement living, and residential aged care, telehealth services, healthy ageing and mental health programs, chronic disease management and rehabilitation and transition care.

## The Challenges Facing Bolton Clarke

Alex Cross, Head of Fundraising at Bolton Clarke, admits the organisation's decision to move to Raiser's Edge NXT was spurred by the current dynamic cloud based offering.

*"Our current system was ageing with limitations and Bolton Clarke had been using it for over 20 years. It no longer had the capability to support the forward-looking vision of our fundraising department,"* says Cross.

Bolton Clarke is powered by  
**Raiser's Edge NXT™**

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It was evident to the Bolton Clarke's fundraising department that the current system would not meet the future strategic and growing demands of the charity if consideration was not made to make the switch to a new and more sophisticated system.

Once Bolton Clarke locked down their fundraising strategy and goals for what they wanted to achieve as a fundraising department, the search began for an alternative donor database solution.



## A Complex Decision-Making Process Involving Multiple Stakeholders

As part of the overall selection and decision-making process, the team at Bolton Clarke embarked on several ways to help choose the right solution.

From market analysis and review of industry benchmarks through to conducting interviews with potential vendors and key customers across different charities including animal and health charities, to attending vendor seminars and product demonstrations.

According to Cross it was a long process but well worthwhile. There were multiple stakeholders involved in the approval process across key areas of the Bolton Clarke business, from the project officers right through to executive level sign off from the Head of Brand and IS.

*"We evaluated several alternative solutions before the final decision was made to bring on board Raiser's Edge NXT. It was at least nine months from when the business case was submitted and the evaluation process commenced, right through to key stakeholders, including the management team signing off on the solution,"* says Cross.

*"This level of reporting and level of analysis is something that was unseen in the old donor database. We now have the power to report how our fundraising efforts are going across the entire organisation."*

## The Result

By bringing on board Raiser's Edge NXT there are immediate benefits for the charity. The biggest impact is the ability to undertake more accurate marketing segmentation for direct mail activity.

*"We are much better able to segment our database and tailor messages to a specific target audience and that is solely due to the ability of the donor database.*

*Previously, we would have done a mass export from the old database into an Excel spreadsheet and then conduct a lot of manual workarounds. This has been eliminated through the implementation of Raiser's Edge NXT."*

Another key area of benefit Cross highlights is in reporting and analytics. Bolton Clarke through Raiser's Edge NXT have all the tools integrated into one place providing them with the capability to analyse giving histories instead of undertaking guesswork. They can also manipulate the data in such a way that enables them to clearly identify individual giving history, segment, or appeal and easily view the results.

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*We now have the power to report how our fundraising efforts are going across the entire organisation,"* reinforces Cross.

Bolton Clarke have recently put the Raiser's Edge NXT solution to the test by distributing their first Tax Appeal campaign.

When asked about highlighting through quantifiable figures some of the benefits they have started to realise through the solution, it's still early as the mid-year Tax Appeal is one of the first initiatives distributed since bringing on board the new solution.

Cross agrees that early analysis shows the organisation exceeding its target for the mid-year tax appeal.

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## The Future with NXT

Cross has set expectations high for the future and believes that over the next few years Bolton Clarke will increase their Raiser's Edge NXT™ users from anywhere between 4 to 8 users.

*"What we hope to achieve in the future is to gain a much better view of donors' giving histories along with a better understanding of donor behaviours. This will enable our organisation to see who gives to what and when, as well as capturing individual responses,"* notes Cross.

More importantly, with this kind of critical information at his fingertips, Cross can continue to focus on developing a much more donor-centric journey for Bolton Clarke's donors.