

The klevr logo features the word "klevr" in a white, lowercase, sans-serif font. To its right is a stylized orange circle composed of several overlapping, slightly offset segments, resembling a globe or a network node.

KLEVR FUNDRAISING & GRANTS CASE STUDY

The Walkerscott logo consists of the word "walkerscott" in a white, lowercase, sans-serif font. To its right is a small, stylized green circle with a white outline, similar in design to the klevr logo.

CLIENT

Hunter Medical
Research Institute

Challenges

In the Not-for-Profit and Medical Research sectors, trust is the primary currency. HMRI's legacy systems had become fragmented, creating "data silos" that made it difficult to provide a clear, transparent path from a donor's contribution, to a researcher's lab.

Brief

The brief to Walkerscott focused on a critical Not-for-Profit requirement, the need for a single source of truth. HMRI required a platform that could manage the complex lifecycle of philanthropic giving, track restricted funding pools, and automate the reporting required to maintain donor confidence and board level oversight.



Hunter Medical Research Institute (HMRI) is a cornerstone of the Australian medical research community. Since 1998, they have operated at the intersection of philanthropy and science, ensuring that community donations are translated into life-saving medical breakthroughs.



Solution

Dynamics 365, Klevr Fundraising, and Klevr Grants work together to make a single source of truth possible.

To bridge the gap between fundraising and clinical outcomes, Walkerscott implemented a specialised stack built on Microsoft Dynamics 365 CRM and integrated with Business Central ERP. This solution was designed specifically to handle the nuances of medical research grants and Not-for-Profit financial compliance.



Technologies



Klevr Fundraising

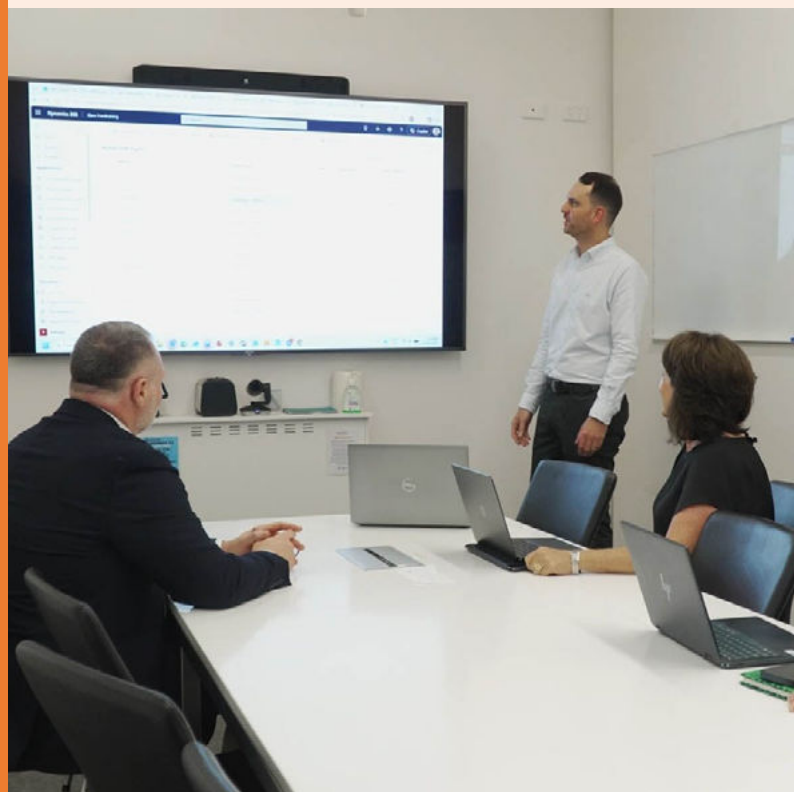
Designed for the Philanthropy team to manage donor journeys, track donor interactions, and process complex gift types.

Klevr Grants


A dedicated tool for the Grants team to manage funding pools, allowing researchers to apply for initiatives while maintaining strict audit trails.

Business Central

The financial backbone that connects every donation directly to its specific research project, ensuring no "black holes" in the data.



Walkerscott's role spanned from Vendor Selection Advisory to full implementation, ensuring the technology supported the unique regulatory and ethical standards of the healthcare research sector.



Klevr enables HMRI to track the dollar end to end, right from the fundraising side, through to how that money is applied for grants.

Results

The implementation has redefined how HMRI operates within the healthcare Not-for-Profit landscape. By unifying their data, they have moved beyond simple bookkeeping into advanced data modelling and predictive insights.

"We actually saw benefits even before we had the systems live... cultural benefits, organisational benefits and team collaboration benefits. The teams started to better understand each other in terms of the way they work."

Brian Jones, Chief Operating Officer – HMRI

Impact on the medical research mission

- **HMRI have achieved end-to-end transparency.** They can now demonstrate a direct line of sight from a donor's dollar to the specific research grant it funded.
- **They can make evidence based decisions.** The board now receives predictive analysis, allowing for strategic investment in research areas that show the highest potential for impact.
- **Enablement of a collaborative culture.** Breaking down silos has allowed the Fundraising and Research teams to work closely together, powered by a shared view of the organisation's mission.

"[It allows us] to use much more predictive analysis about where we're going... that helps both the management team and the board really get the confidence that we're making good decisions based on good inputs."

Brian Jones, Chief Operating Officer – HMRI

Working with Walkerscott

Choosing a partner in the Medical Research space requires more than technical skill, it requires a shared commitment to the mission.

"We had the right approach to agility, focusing on what solution was needed at the time... our teams learned a lot about how to get the best out of each other as well. It wasn't just about that technical implementation."

Brian Jones, Chief Operating Officer – HMRI

