

Advocacy group uses data from ClearView CRM to grow and measure

Few in the nonprofit world these days dispute data's importance in fundraising, but many organizations still struggle to take full advantage of the power of data.

Not so for the American Center for Law and Justice, whose use of data over the past decade or so has steadily increased. Today ACLJ employs sophisticated data-management tools to achieve its primary fundraising challenges—“staying above the rate of attrition and getting the word out,” says ACLJ's controller, Sharon Alford.

Complex fundraising mix

Washington, D.C.-based ACLJ was founded in 1990 with the mandate to protect religious and constitutional freedoms. The organization “engages legal, legislative, and cultural issues by implementing an effective strategy of advocacy, education, and litigation that includes representing clients before the Supreme Court of the United States and international tribunals around the globe.”

Alford's department oversees all functions related to ACLJ “members and money.” She and her staff segment data files for mailing or telemarketing, process gifts, oversee accounting and audits and more. They also interact closely with ACLJ's marketing team.

To get the word out to current and potential donors, the organization has for years managed a complex interplay of integrated fundraising channels:

- Telemarketing
- Direct mail
- Online giving
- Broadcast media (“ACLJ This Week” television and “Jay Sekulow Live” radio programs)

The success of ACLJ's overall fundraising program emerges from the balance of each channel within the mix and the integration all efforts for maximum effectiveness. The channels “rely on one another,” Alford says. Responses to a television or radio program are taken by an inbound calling center.

Online givers read about recent cases when filling in a donation form. Content in direct mail pieces reflects content on TV, and so on.

To address attrition, according to Alford, ACLJ runs recapture programs to better target donors. If a donor has given to a specific cause, the ACLJ reaches out to that donor when it is, for instance, litigating a related case. “We do individual targeting and are responsive to donors,” Alford says.

Data-driven results

ACLJ's fundraising efforts rely on accurate, up-to-date data. The organization has used ClearView CRM (formerly PledgeMaker) from SofTrek Corporation for more than 10 years to manage and take advantage of its data on donors (“members”) and giving. Anyone in Alford's department who deals with members or with list segmentation uses ClearView CRM—member services representatives and managers, major donor cultivators, data entry, caging (processing) and data management staff who deal with data files.



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ACLJ chose the system initially for its powerful segmentation tool. The organization conducts upwards of 30 segmentations a year, at least three a month, according to Alford. "Our database is large—300,000 to 400,000 in mailings from 700,000 to 1.5 million people. We use 2500 appeal codes that we run across that for segmenting." ACLJ breaks the segments into small chunks based on media source and analyzes its ROI.

ClearView CRM helps the organization determining quantitatively which members and media sources are the most responsive by examining how recently a member has made a gift, how often s/he gives and how much s/he gives. This classic "RFM" (recency, frequency, monetary) segmentation allows ACLJ to finely target its direct marketing lists. "We talk differently to members based on which channel they come through," explains Alford. ACLJ also runs its database through the WealthEngine wealth-screening tool that is integrated into ClearView CRM to further segment lists.

ACLJ's member services group makes use of ClearView CRM's prospect record tools, using categories ("attributes") ACLJ has selected (like appeals to which the donor has given or the date of the last gift) to narrowly segment its lists. When member services representatives talk to members, they have a wealth of information on their computer screen so they can easily tailor the discussion appropriately. Says Alford, "We make great use of contact records--when we last talked to the member, if she or he had an issue or celebrated an event like a marriage. "

Data management staff use ClearView CRM's lockbox tool "all day, every day." Staff used to key in information on every check that arrived via postal service. If 10,000 checks arrived at one time, staff could often spend a week processing them. Today, the organization's scanning system is connected to ClearView CRM's database via an API, and every gift is scanned, entered and lockboxed. ACLJ processes 7500 mail pieces each day, banking the gifts and posting them to its general ledger. ACLJ also lockboxes data from telemarketing and online giving.

Reporting is another vital ClearView CRM tool, and the organization makes full use of a range of reporting and business intelligence available in the system. ACLJ determines the success of its retention efforts, for instance, with an easy-to-access donor performance index report (DPI). DPI gives the organization a summary look at members' giving histories and assigns renewal categories to better inform decisions about renewal programs.

Flexibility and support

Before choosing ClearView CRM in 2000, ACLJ outsourced its data management work, and Alford had begun considering building a custom software system. "Had we done that," she says, "it would have been the biggest mistake we could have made." The deciding factor in her decision to choose SofTrek's system was flexibility: "Other companies were trying to fit us into their specific mold. With SofTrek, we had a lot of meetings about how they could adapt their system to meet our needs."

Alford notes that ACLJ also is adapting ClearView CRM to meet some of its future needs, such as topic-driven segmentation, for example.

She asserts that, with SofTrek, ACLJ bought "a relationship. You have to have the communication. The person at SofTrek supporting my product cares about the success of my organization." The relationship, she adds, has come a long way. "The support is awesome. If I say something, I'm heard, and any issues are generally addressed in a near-future [ClearView CRM] release."



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